Teachers’ mental health status, stress levels and incidence of burnout during a period of change and reorganization within the South African Education System.

by

Madhumati Jeena

Submitted in partial fulfilment of the requirements for the degree of Master of Education (Educational Psychology) in the Department of Educational Psychology, University of Natal, Pietermaritzburg.

1998
DECLARATION

Unless otherwise indicated in the text, this dissertation represents my own work.

Madhumati Jeena
ACKNOWLEDGEMENTS

I am grateful for help received from many people in the completion of this research. I would like to particularly thank:

Sincere thanks go to my supervisor, Robin Farman, for his constructive advice, support and guidance throughout the course of this study.

Jacqui de Haas for moral support and motivation.

Kaymarlin Govender for his assistance with statistical analysis.

Krishnan Moodley for editorial assistance.

A special thank you to the teachers who willingly participated in the research, the principals and the Department of Education. Without your co-operation this study would not have been possible.

To my daughter, Janeen, for believing in me.

I am especially grateful to my husband Hiren, for his unfailing love, constant support and assistance.

To my mother, family and friends for love and support over the years.

The financial assistance of the Centre for Science Development (HSRC, South Africa) towards this study is hereby gratefully acknowledged. Opinions expressed and conclusions arrived at, are those of the author and are not necessarily to be attributed to the Centre for Science Development.
ABSTRACT

The education system in South Africa is undergoing vast changes in the post apartheid era. These include amalgamating the previously segregated departments, developing disadvantaged schools, financial cut-backs and the implementation of the controversial Right Sizing Document (1996). Kwa Zulu-Natal currently has a severe shortage of education facilities. Many children are not attending school and there is a dire need for qualified educators. Outcomes Based Education is being phased in, concurrently with the other changes. Despite this, the Right Sizing Document calls for a reduction in teaching personnel. It is unclear how reorganisation and the prospects of redundancy and redeployment have affected teachers.

The aims of this study were to determine teachers’ mental health status, stress levels and incidence of burnout during a period of major transformation and to explore teachers’ perceptions of the changes. The researcher used a descriptive cross-sectional design. A sample of 217 teachers was used, from urban primary and secondary government schools in the Pietermaritzburg North region.

Data were collected using two standardised self-report measures, the General Health Questionnaire (Best 30 item version) and the Maslach Burnout Inventory. Teachers were also asked to respond to a list of statements on Redundancy and Reorganisation Issues, designed by the researcher. The data were analysed by z-tests, analysis of variance, Pearson’s correlation, Mann-Whitney tests and Kruskal-Wallis one way analysis of variance. Responses to an open-ended question were analysed qualitatively.

The findings indicated extremely high distress levels for all the respondents, irrespective of age, gender and post level, in comparison with published norms and the findings of other studies. This distress did not appear to be associated with their own professional role and competence as teachers but seemed to relate to the uncertainty of their employment situation. The impact of the current changes on teachers’ psychological and physical well-being were reflected by their responses to statements.
in the Redundancy and Reorganisation section of the questionnaire.

It is recommended that the education authorities should develop a recovery strategy to address this urgent situation. Consultation and negotiation with teachers should be an inherent aspect of reorganisation and change, to prevent a repetition of the current situation. The role of professional organisations and various other issues that warrant further investigation are specified.
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CHAPTER ONE

1.1 INTRODUCTION

South Africa is in a period that is characterised by rapid change and reorganisation in the post-apartheid era. All sectors in South Africa are undergoing transformation to bring about equity and to address the imbalances of the past. The cornerstones of change are housing, economics, health and education.

The change in education means uplifting the previously disadvantaged schools, amalgamating the previously segregated departments and the implementation of the Right Sizing document, HMR Circular No. 14 (Appendix one). All of the above changes would have a considerable impact on teachers, since change would involve redistribution of staff, cut-backs and possible redundancies.

Stress among teachers has been extensively researched (Rigby, Bennett and Boshoff, 1996). Several studies have already revealed that teaching is a highly stressful career and the incidence of burnout is high (Cooper, 1995, French, 1993 and Rigby, 1989). According to Jackson et al (1986), increased stress levels in teachers often culminate in strong negative feelings towards teaching, such as discouragement and frustration and finally a desire to leave. While some teachers will leave the profession, others stay but are plagued by a multitude of physical, emotional and behavioural stress-related manifestations (Cooper, 1995). The negative impact of excessive teacher stress on the school system is serious. According to French (1993) increase in teacher stress may significantly impair a teacher’s ability to display effective instructional behaviours and good working relationships with students, reduced tolerance for typical student behaviour and withdrawal of commitment to profession. Rigby and Bennett (1996) say that teacher stress affects not only the teacher but the students, the school, the teaching profession and the educational system.

Any form of change is often characterised by increased stress levels. The added stress 1.
of change is likely to have an additional impact on teachers. According to Rigby (1989), change in itself is inherently stressful. A report by the ex-Natal Education Department (1991) on teacher workload showed an escalation in teacher stress in the previous three years. Teachers have also been working under more stressful conditions in recent years, owing to the uncertainty with regard to what might happen to education in the near future (de Haas, 1995). Teachers are feeling less secure, and find themselves having to cope with pupils from groups (other racial and socio-economic) with whom they may have had little contact and for many, this can be stressful. (de Haas, 1995).

Moodley (1995), reported that stressed teachers may also exhibit a variety of physiological, psychological and behavioural symptoms such as sleep disturbance, migraine headaches, muscular pains, depression, irritability, boredom, aversion to change, poor interpersonal relations, withdrawal, and frequent absenteeism. In support of Moodley (1995), Pierce and Molloy (1990) associated high levels of burnout with poorer physical health, higher rates of absenteeism and lower self-confidence.

This study sets out to assess the mental health status, stress levels and the incidence of burnout among teachers who are facing the possibility of redeployment, severance, and redundancy during this period of rapid reorganisation and changes in education in schools in the Province of Kwa Zulu-Natal.

1.2 RIGHT-SIZING OF SCHOOLS IN SOUTH AFRICA

Change is vital to any organisation and it represents the struggle between what is and what is desired. The process of Right Sizing is driven by the Provincial Task Team and a Provincial Redeployment Agency. The former is a working group of the latter, but has been established as a responsible committee in its own right, which sets out the nationally-agreed procedures to be followed in the process of right-sizing. The aim of the process is to redistribute posts and funding at educational institutions to give effect to the policy of equity in education between the various races. The entire process is to
be phased in over a five year period commencing on 1 April 1995 in accordance with a decision by the Minister of Education.

The phasing in of equity in the funding of education across the newly amalgamated provincial education departments will result in the number of educator personnel increasing in the schools of some former departments and decreasing in others. In order to manage the process of equity, excess educators in education departments or components thereof will have to be redeployed or made redundant.

Educators in the service of public schools in Kwa Zulu-Natal, were given an option to apply for a Voluntary Severance Package. This decision was taken by the Education Labour relations Council (Resolution No. 3 of 1996). This was done to allow educators who prefer to leave the service, to do so and to create room for the absorption of educators who are in excess (Annexure One - Right-sizing document). The best and most experienced educators were removed from the system. The remaining teachers were forced to adjust over-night to an explosion in teacher:pupil ratio. This threw the entire education system into chaos. Poor management and almost non-existent communication with teachers, by the education authorities, are major contributors to the current crisis in education. The process has thus far cost the taxpayers more than R1 billion.

Media continually report the uncertainty in education, the lack of finance, severe financial cut-backs, poor planning by the department and lack of communication with all parties concerned. Just six weeks before the start of the 1998 school year the Education Department is bent on retrenching 5000 temporary teacher in Kwa Zulu-Natal. In the latter half of 1997 the Kwa Zulu-Natal Treasury proposed that 20 466 temporary teachers be sacked in an attempt to rescue the Education Department’s strained budget. The department is expected to overspend by R800 million on its 1997/8 budget of R6,124 billion (Pillay, 1997).

Teachers, teacher unions and the parent community reacted to the proposed
retrenchments with marches, placard demonstrations, mass meetings and the handing over a memorandums to the education departments. The uncertainty around the possible retrenchments interrupts the planning for the new year and creates anxiety in the staffroom.

The writer personally experienced a taste of the lack of continuity in schools in 1997, as new timetables had to be drawn up after 30 April, when many educators were granted severance packages. The discontentment, high absenteeism and high anxiety levels were evident in almost every school. The problem was compounded by high pupil-teacher ratios, lack of resources, increased work load, and the proposed phasing in of Outcomes Based Education in schools from the beginning of 1998.

Competition and rivalry increased among teachers who were striving to fill many of the vacant posts left after severance packages were granted. Friends and collegial support were lost in the process and stress and burnout levels rose rapidly. This was further compounded by schools being administered by educators who lacked the requisite skill and experience in administration. In some schools the entire management was granted severance packages and the schools were left in the hands of inexperienced teachers. Lack of planning and foresight on the part of the education department, ignored the mental well-being of teachers during a period of high anxiety and stress. Professional support or counselling programme were not integrated into the reorganisation programme.

In a country that is striving for democracy after apartheid, education is a vital cornerstone to its future development and up-grading. To neglect education seems short-sighted and its impact is far reaching. One of the most crucial aspect of education is teachers. Their well-being, psychological, physical and emotional is of utmost importance. To neglect this would be to fail education as a whole.
1.3 OBJECTIVES OF THIS STUDY

The aim of the study was to examine teacher's mental health status, stress levels and incidence of burnout during a period of major re-shuffling, reorganisation, cut-backs, phasing in of Outcomes Based Education and possible retrenchments. This study investigates whether differences in these health measures can be associated with gender, age and post level of teachers. The perception of teachers on redundancy and reorganisation issues were also gathered.

The results of this study could provide useful information for stress management, stress reduction and peer-collaboration programmes which are necessary because of the reports of increasing pressures discussed above. A major weakness at present is the omission on the part of the education authorities to provide professional support, intervention strategies and stress management programmes for teachers. Dunham (1983) recommends the following in a stress reduction programme: more support from all levels of the hierarchy, more consultation, more meetings to discuss, share feelings and experiences with other teachers and positive moves to involve teachers in the decision-making process. Basson (1988) in discussing stress among Educational Psychologists suggested that a component of the training focuses on self-development, stress-management and the equipping of students with the skills to prevent burnout. There is no reason why such techniques cannot be incorporated as pro-active measures into teacher training programmes. Having knowledge of the teacher's stress and burnout and their mental health status during a time of rapid change will be useful to the education department. When planning for change, programmes could be implemented to help teachers cope with the anticipated changes.

With this in mind, and noting that teachers are the major role-players in any change process in education, this study examines aspects of teachers' mental health at this time. Particular attention will be paid to the possibility of redundancy occurring as a result of the major reorganisation within the education department. The results of this study could be used when planning
teacher support service. It would provide direction as to which teachers would need
the most support, in terms of age, gender and post-level.

In the following chapter the literature concerning the health status of teachers and the
issue of reorganisation will be reviewed. Theoretical matters and empirical findings
will be discussed in relation to the present reorganisation in Kwa Zulu-Natal. The third
chapter presents the design and specific objectives of this study. The research
questions are specified and the rationale for the selection of instruments given. In the
fourth chapter, the research findings are presented and analysed in terms of the
research questions. The fifth chapter discusses the findings in relation to the material
reviewed in chapter two. In the final chapter, the implication of these findings for
theory and practice are identified. Strengths and weaknesses of this study are
indicated. Recommendations for further research into these issues are given in the light
of the process and findings of this investigation.
CHAPTER TWO

LITERATURE REVIEW

2.1 INTRODUCTION

Any discussion about education in South Africa needs to be located within the historical context of a country that has had to contend with over three hundred years of colonialism and the system of apartheid. The consequences of this history for education are enormous (Wedekind, 1995). The background to the study is provided by a brief account of the historical development of education in South Africa and how this has impacted on teachers.

The first formal school was reportedly established in 1658 at the Cape, specifically for the newly arrived slaves (Molteno, 1984). Missionaries and the Dutch East India Companies made attempts to educate the ‘African’ population. From the onset then, education can be viewed as the ruling group exercising a form of social control over other subordinate groups of people. Although education was seen as an important means of social control, one cannot speak of state sponsored mass education having been seriously undertaken until the Nationalist government started implementing its apartheid policies in the 1950s (Wedekind, 1995). According to Wedekind (1995), it was this infamous policy that sought forever to damn Black people to be “hewers of wood and drawers of water”, which ironically gave large numbers of Black people access to some form of schooling for the first time. Control came in the form of Christian National Education and liberal thinkers came with the ideas of ‘separate - but-equal ‘ education. Here schools were racially separated to suit current economic and political thinking. With the release of Nelson Mandela and the induction of a Government of National Unity in the first half of 1994 major changes began in South Africa. Education was one of the primary foci of change.

The previously racially divided education departments in South Africa formally ceased
to exist and became part of the new provincial education authority on 1 April 1995.

This marked a symbolic end to a long history of a divided and divisive schooling system. According to Wedekind (1995), the change in structure does not just signal the end of a part of our history, rather it marks the beginning of a long process of undoing, adjustment and rebuilding.

During this period of rapid change teachers will be facing a great many challenges. Changes will be taking place in the administrative structures, composition of the pupil body, curriculum, the methods used in the classroom and the relationship between teachers and their pupils. During this period of change, teachers will require support and ongoing training (Wedekind, 1995).

Change in any organisation is inevitable; however, the impact of change on stress-levels, burnout and mental health status on the individual is often not considered. This has considerable consequences for the individual, organisation and society. With this in mind this chapter sets out to discuss changes in education, stress, burnout, mental health, and redundancy. Information on various models, perspectives, current debates, research findings and consequences of stress and burnout will be included. Relevant South African studies will be reviewed.

2.2 CHANGE IN EDUCATIONAL ORGANISATIONS

2.2.1 What is change?

There is widespread agreement in the literature that change and renewal are among the most important aspects of an organisation. When an organisation fails to change, it stagnates and eventually declines. Consequently, change and renewal can be regarded as essential for the development of an organisation. An implication of this is that the school as an organisation has to be seen as a dynamic entity (Theron, 1996). Organisational change is perceived as an integral aspect of the functioning of an
organisation. According to Theron (1996), the goal of organisational change must be to improve the quality of working life of people involved in a school. But what is change? Change represents the struggle between what is and what is desired. It is also an unavoidable feature of human experience. Change is a process pursued for and by people. Most important, according to Theron (1996), change begins and ends with individuals acting in unison to make schools effective.

A distinction can be made between planned and unplanned change. Planned change implies a deliberate alteration in the status quo. Planned change is always preferred, since change takes place according to specified goals and objectives. Change can take many forms, for example, social, technocratic, interactive and transformational change. The form of change that best describes the current changes in education is "transformational change". This involves radical change when the education system is working poorly. External and internal forces insist on radical changes; the change is dramatic in form and rapid in impact, and will ultimately change the entire culture of the organisation radically (Theron, 1996).

The theories of Kurt Lewin (1935, cited in Theron, 1996) on organisational change deal with the interaction between the various forces that bring about change and forces that resist change. According to Lewin (1935), change is not a static but rather a dynamic balance of opposing forces active within an organisation. Any existing situation within a school is in equilibrium, that is, the result of driving forces and resisting forces working against each other. Any change would involve a driving force for change and forces of resistance. A balance or state of equilibrium has to be reached between the two forces. This is depicted in Figure 1.

There are several models of change, e.g. Havelock's two models of change, problem solving model, and the linkage model of change (Theron, 1996). Of the relevant models, the two models that seemed most relevant are: the organisational development model of change and the concerns-based adoption model of change. These will be discussed further.
2.2.1.1 The organisational development (OD) model of change

A basic assumption of OD is that the nature of the group or organisation is the source of many of the problems associated with changing schools. The focus of change for OD is the group, not the individual. According to Hall and Hord (1987), schools are a system of people working at tasks interdependently, eventually they begin collaborating with other sets of individuals as they move from one task to another. The ultimate goal of OD is the development of organisational adaptability, and improving subsystem effectiveness. If one has to examine one aspect of the many changes that are currently occurring in South Africa, one would see that the process is contrary to the basic assumption of the OD model. In the implementation of Outcomes Based Education and the implementation of Curriculum 2005, teachers were not invited to participate in its development (The Educators’ Voice, 1997). Educators are the agents
of change and it is their experience and expertise that should inform the development of the curriculum.

For the change to be maintained, continuity in leadership personnel (the school principal) is important (Theron, 1996). Clearly this aspect of continuity of leadership was not followed in South Africa. Most of the Severance Packages that were granted were to senior educators, many of whom were holding promotion posts (i.e. leadership personnel). Ironically, disorganisation was also created by senior department education personnel who began to implement the changes but subsequently volunteered for the Severance Package and left at an advanced stage of the change process (The Educators’ Voice, 1997).

A shortfall of this model is that the perceptions of the individual are not considered. In South Africa many educators complained about lack of consultation by the education authorities and of changes being imposed. The teachers’ union, SADTU, echoed this view in their newspaper, The Educators’ Voice (1997), when they complained of lack of transparency, democracy and participation on the part of the education department. The perceptions of the individuals involved are very important, as the individuals make up the group. The perceptions, attitude and commitment of the individual can determine the extent of success or failure of the change.

2.2.1.2. The concerns-based adoption model of change.

Many models of change pay little or no attention to the impact of change on teachers and their perceptions of change. According to the concerned-based adoption model of change, the perceptions of the individual in the change process is important for successful change (Hall and Hord, 1987). This model is based on the following seven assumptions and assertions (Hall and Hord, 1987):

*Understanding the point of view of the participants in the change process is critical.*

For the change to be successful, the perceptions of the clients (teachers) must be
understood by the change facilitators, and the clients must have insight into their own perceptions as well.

*Change is a process, not an event*
Implementing educational innovations is a process: this process requires time. There are steps and phases in the process that can be used to plan and pace change.

*It is possible to anticipate much that will occur during a change*
In a change process there are many predictable events and happenings. Thus the reactions to interventions can be anticipated. Consequently many aspects of the change process can be planned. By planning for the expected, effective facilitators are better able to handle unanticipated occurrences, and to utilise their limited time and resources well.

*Innovations come in all shapes and sizes*
The process of innovation encompasses either a product innovation (example text book or curriculum change) or process innovations, such as instructional procedures.

*Innovation and implementation are two sides of the coin of the change process*
In all cases, regardless of the type of change, developing the innovation and implementing it requires parallel sets of steps and procedures.

*To change something, someone has to change first*
The ultimate effectiveness of an innovation depends on whether teachers and others change in order to incorporate the new practice. The first step, therefore, is to develop a picture of how each staff member experiences the change process as an individual.

*Everyone can be a change facilitator*
Often responsibility for change is assigned to one person. This view is limiting according to this model. Change is seen in this model as a shared responsibility that involves everyone at one time or another.
According to the concerns-based model, change is a process for and by the people. It has a technical and a human side. It starts and ends with individuals, who in combination, make schools effective (Hall and Hord, 1987). In the current changes in education, the human side was apparently ignored. Often teachers were blamed for the current crisis. The headlines in The Natal Witness (9 January 1998) reads: “Bengu warns lazy teachers.” (Sibusiso Bengu is currently the Minister of National Education). The article further reports that the Minister asked teachers to pull up their socks or be fired. He recommended that teachers be evaluated on their teaching performance and the provincial authorities should fire those who are not up to scratch. The unacceptable nature of the criticism of teachers by the government and the media is a source of anxiety and anger. Teachers need to be supported and guided through this period of rapid change and punitive comments should be avoided.

2.2.2 Resistance to change

Change becomes most meaningful when there is resistance to it and there will always be resistance to change (Theron, 1996). Resistance is the general response to proposed change. This is related to the insecurity around the loss of the familiar and reliable, loss of personal choice and values, understanding the reasons for change, fear of change, mistaken perceptions in respect of change, and lack of skills (Van der Westhuizen and Theron, 1996). Change can be a painful process yet the outcome can be refreshing and rejuvenating for the teacher, pupil and the school as a whole. This is clearly shown in the history of education in South Africa.

Historically, as far as black education was concerned, demand for change in education was enormous. It took the form of boycotts, protest marches and strikes. The crux of all these events in black education is the demand for change and renewal of the existing system. The poor results and lack of facilities in black education elicited demands for change from pupils, teachers and the parent community to make education more productive (Van der Westhuizen and Theron, 1996).
Change in education occurred rapidly over the past five years. After the elections and the planning of the new non-racial educational system, there is now new resistance to the process of change in education. Change often lead to financial restraints, which in turn meant a decrease in personnel, text books and stationery. Teachers, teacher unions and parents resisted such cutbacks. For the parents it meant greater financial input by them. This gave rise to resistance from within and outside of the education system.

Change in education in South Africa is intended not only to bring about equity of provision. Changes in teaching methods, syllabi and modes of assessment are also planned. Curriculum 2005 is already planned to be phased in over the next five years. A new approach to teaching is called the Outcomes Based Education. This approach will be implemented in Grade one in 1998. Teachers are anxiously anticipating the introduction of Curriculum 2005 and Outcomes Based Education. It is expected to create further confusion and to send teacher motivation and confidence plunging to new depths. The new curriculum requires small classes and skilled and dedicated teachers yet the new policy direction will entrench a system which provides exactly the opposite. For the teachers in South Africa, it is the first time that they will be given a comprehensive definition, outline and statement of how education should take place. This change has not come without resistance. Educationists and Parents who have criticised the Outcomes Based Education complain that this method of education had failed in many overseas countries (Stielau 1997). Educators complained that they were not sufficiently consulted in the planning of Curriculum 2005. They felt that their professional self-esteem had been undermined. Educators were also critical of the demand to implement a curriculum which they had not constructed. Teachers were not sufficiently trained to teach in this style and schools were not prepared for this change.

Thus, any form of change or non-change is usually accompanied by resistance. The important question is: "To what extent is change resisted in education?" Very little information can be traced on this aspect. Theron (1996) discussed two studies,
that of Trump (1987) and Perry (1993). From Trump’s study, carried out in secondary schools in Ohio (USA), it appeared that resistance to new ideas was the second greatest single factor experienced by school principals when implementing new teaching programmes. The two problem areas were the time allocated for its implementation and the teachers’ resistance to new ideas. Whatever the extent is to the resistance of change, it is an important factor to consider when implementing change.

For the purposes of the current study, an understanding of the teachers’ experiences through all the changes and resistance, provides a backdrop to the study. The contribution of these experiences to their current stress, burnout and mental health status cannot be ignored.

2.3.2. Problems caused by organisational and curricular changes in education.

Dunham (1992), studied major changes in education in England. The teachers were under pressure to use new and more rigorous methods of assessment and to maintain high professional standards in the face of reduced financial supports in schools. These changes and the experiences that teachers were experiencing are similar to the current transformation in education in South Africa. Some teachers viewed the change as positive and an opportunity for fresh patterns of teaching, new relationships, opportunities for personal and professional growth. Other teachers perceived the changes as a threat and with apprehension. Their apprehension included the following important aspects (Dunham, 1992, p 5):

* Leaving the security of a familiar environment in the previous school.
* Working in larger and more complex schools.
* Teaching pupils who had a much wider range of abilities, behaviour and attitude.
* Adaptation to major organisational and curricular changes.
* Coping with personal losses, of old friends, heads of departments and pupils.
* The sources of stress were not staggered to allow for adjustment. Major changes came too quickly.
The situation was captured well in a staff report by a teacher: "We felt that when this school was opened we were thrown into far too much change. There were too many ideas that we were trying to operate all at the same time and this gave us a great deal of insecurity. We lacked stability. We had far too many things that we could not cope with and this was the root cause of our trouble. We felt that it was not too late to impose some stability, to stop the changes, to keep going as we are and build slowly on what we have got. We want to improve the quality of life for the children in the school but we cannot do this when we are developing too rapidly to give ourselves a secure base from which to work." (Dunham, 1992, p 8).

The teachers in Kwa Zulu-Natal may be going through similar experiences.

2.3. STRESS

2.3.1 Introduction

Dunham (1992, p 3) defines stress as, "a process of behavioural, emotional, mental, and physical reactions caused by prolonged, increasing or new pressures which are significantly greater than coping resources." A similar but longer definition is offered by Kyriacou and Sutcliffe (1978), "teacher stress may be defined as a response of negative affect (such as anger or depression) by a teacher usually accompanied by potentially pathogenic physiological and bio-chemical changes (such as increased heart rate or release of adrenocorticotrophic hormones into the bloodstream) resulting from aspects of the teacher's job and mediated by the perception that the demands made upon the teachers constitute a threat to his self-esteem or well being and by coping mechanisms activated to reduce the perceived threat." Both these definitions are comprehensive and are considered relevant to this study.

It is important to note that stress is difficult to measure and define. According to Bernard, 1968, cited in Glowinkowski and Cooper (1985), a well recognised factor is whether a certain amount of stress might be of benefit to the individual. Most studies,
at least implicitly, require the individual to rate pressure negatively. They leave little room to accommodate the individual who feels under pressure, but at the same time derives satisfaction from that pressure. For some people a reduction in ‘job clarity’ may mean an increase in ‘autonomy’, yet for others it may represent a taxing burden of ambiguity.

There is a myth that goes: “I will be at my best under no stress at all.” However, it has been shown that no pressure often leads to poor task performance and a lack of motivation. The same applies when you are over stressed. The secret seems to lie in achieving a balance between the two extremes - finding that level of pressure which leads to good motivation and effective task performance. This optimum stress level varies from individual to individual, so it is urgently necessary to discover that level of stress beyond which your psychological and physical well-being is endangered (de Haas, 1994).

Early studies on occupational stress focussed on industry and ignored the human service sector, such as the teacher (Rigby, 1989). On the other hand, Maslach and Jackson, 1986) have shown that human service professionals are more likely than others to experience job burnout. Since burnout is one of the reactions to high levels of stress it seems that occupational stress for this sector is a serious problem which needs to be addressed. In recent years teaching has steadily moved up the ‘league table’ to become one of the most stressful occupations around (de Haas, 1994). Research on teacher stress has tended to concentrate on defining the stressors which lead to teacher stress. Few studies have paid attention to the impact of major transformational change in education on teachers’ stress and burnout levels.

2.3.2 Perspectives on stress

Bennett (1989) understands stress as being ordinary and commonplace phenomenon but its clearly definable properties are elusive. This view emphasizes some of the difficulty around the conceptualization and definition of stress. Over the
years attempts have been made to conceptualise and define stress. There are three major approaches to understanding the nature of stress in teaching: The first approach to understanding stress looks at the pressure exerted on teachers in schools. This model suggests that people, too, have their limits. Up to a point, stress can be tolerated. When it becomes intolerable, damage may result, either psychological or physiological, or both (Dunham, 1992). From this perspective, stress is a set of causes, not a set of symptoms. This view is often criticised since it does not take into account individual differences in response to stress such as personality factors and previous experience to similar demands (Dunham, 1992).

The second approach is concerned with the forms taken by teachers’ reaction to these pressures. These may consist of emotional and bodily manifestations such as headaches, anxiety, agitation, irritability, weepiness, depression, mounting tension, frustration, and a general unpleasant emotional state. This view defines the concept of stress in terms of the degree to which a person is experiencing persistent and high levels of anxiety or tension. This perspective has a strong medical orientation in trying to understand stress. This is also often seen as its major weakness. This view is criticised in that it does not take into account other important manifestations of stress which are not emotional or psychological, for example, ineffectiveness in the performance of one’s role in school and loss of confidence (Dunham, 1992).

The third approach to stress is concerned with both the pressures, reactions and coping resources. Stress from this perspective is concerned with an excess of pressures over coping resources. It also is concerned with identifying the demands which teachers perceive and experience as stressful and the behaviour they use to tackle these demands. It is called the Interactional approach (Dunham, 1992).

In order to account for weaknesses in both response-based and stimulus-based definitions of stress, an Interactional approach model is proposed by Sutherland and Cooper (1990).
2.3.2.1. The Sutherland and Cooper model.

According to this model, people are seen as continually interacting with their environment. During this time they weigh up perceived demands and their perceived capability to meet those demands. Stress is therefore seen as a result of the existence of a relationship between the person and the environment (Louw and Edwards, 1993). The problem is around defining this relationship. Sutherland and Cooper's model is comprehensive and is widely supported by researchers today (Louw and Edwards, 1993). Sutherland and Cooper (1990), in their reformulation of the traditional interactional models, considered five major issues (Figure 2). In the environment there exists potential sources of stress, e.g. events, situations and objects. An individual's perception of the event or object depends on their familiarity with it or previous experience or exposure to it. A cognitive appraisal (judgement) of the level of threat arises from the potential stressors. This is influenced by the individual's previous experience. When there is a difference between the actual demand and actual ability, on one hand, and perceived ability and perceived demand, on the other hand, distress, pressure or strain may result. When this happens, successful coping may restore the balance, while unsuccessful coping results in psychological, physiological and behavioural problems, which may be short or long term. Feedback is built into the system and this influences decisions/appraisals made by the individual.

To further illustrate the interactional model of stress, Figure 3 shows a number of physiological and psychological factors interacting on one another, resulting in the stress response. Figure 4 provides a workplace example of the interactional nature of stress symptoms.

2.3.3 Gender and stress

The findings on gender differences have been equivocal. Some studies report gender
Figure 2

An interactional model of stress (Sutherland and Cooper, 1990 p. 18).

Figure 3

Interactional nature of the symptoms of the nature of stress (Louw and Edwards, 1995 p.650).

Figure 4

A workplace example of the interactional nature of stress symptoms (Louw and Edwards, 1995 p.650).

20.
differences, while others do not. Kyriacou and Sutcliffe (1978) found female teachers appeared to find several items regarding pupil misbehaviour a greater source of stress than their male colleagues, whereas the latter reported greater stress for administrative and paper work.

2.3.4 Age and stress

Kyriacou and Sutcliffe (1978) found younger (and less experienced) teachers reported greater stress around issues of punishing pupils, difficult classes, maintaining discipline and attitude of principal.

2.3.5 Post-level and stress

According to Kyriacou and Sutcliffe (1978) teachers listed a greater number of items as stressful than heads of departments. Heads of departments found administration and paperwork more stressful.

Cooper and Kelly (1993), in their study of occupational stress among head teachers, found that male head teachers' level of job satisfaction was higher and their mental health was better than that of female head teachers. Female head teachers suffered significantly greater job dissatisfaction than their male counterparts.

2.4 BURNOUT

2.4.1 Introduction

It should be recognised that stress and burnout are not the same thing. Burnout is more a derivative of stress than a synonym (Van der Merwe, 1993). Black (1991) points out that burnout is the result of unmediated, or unsuccessfully mediated stress, that is, having no 'buffer' or support systems. Black (1991) also notes that stress can lead to burnout, but not all individuals who are stressed are 'burntout'. Burnout
therefore is the final step in the progression of unsuccessful attempts at coping with a number of stress conditions. Various studies cited in Friesen and Sarros (1989) have shown that burnout and work stress are highly correlated.

The concept of burnout has developed empirically rather than theoretically. The concept has been shaped by four somewhat overlapping perspectives. Bryne (1994) cited four major perspectives of burnout and its development over time. Firstly, Freudenberger's model (1973) provided a clinical perspective of burnout. Here burnout is seen as a state of exhaustion that resulted from working too intensely and without concern for one's own needs. The second perspective, a social-psychological perspective of Maslach and Jackson (1981 b) took a more research-oriented approach by trying to identify working conditions that are conducive to burnout. Freudenberger (1973) perceived burnout as precipitating even more effort on the part of the professional worker. Maslach (1982) views burnout as a condition that leads to the worker withdrawing and treating clients in a detached, dehumanised manner. The third perspective, that of Cherniss (1980) provides an organisational perspective to burnout. He sought links between burnout and particular features of the work environment, but he did so from an organisational perspective. Finally, the social-historical perspective (Sarason, 1983) emphasizes the impact of society at large on the precipitation of burnout, rather than the individual or the organization. Sarason says that societal values embracing the philosophy of individualism over sense of community become the a catalysts to burnout. There is continuing debate around the source of burnout in the work place. The conventional view is that burnout derives from the presence of strain-making stressors. Other observers shift the focus to the absence of positive motivators (Friesen and Sarros, 1989).

2.4.2 Definition and components of burnout.

Klarreich (1990) defined burnout as a process of progressive emotional deterioration, with a four phase process essentially moving from idealism through disillusionment, frustration and despair. The term "burnout" evokes different responses from
Individuals and is all too often used as a buzz word. Generally the burnout syndrome has been linked with identifiable psychological and behavioural responses to unmediated work stress in a variety of helping service professionals.

A widely accepted conceptualization of burnout is provided by Maslach and Jackson (1986), who defined burnout as "a syndrome of Emotional Exhaustion, Depersonalization, and reduced Personal Accomplishment that can occur among individuals who do 'people work' of some kind (p 1). A key aspect of the burnout syndrome is increased feelings of Emotional Exhaustion; as emotional resources are depleted, workers feel they are no longer able to give of themselves at a psychological level. The development of "Depersonalization" is yet another important aspect of the burnout syndrome. This involves the negative or cynical attitudes and feelings about one's clients. The third aspect is reduced "Personal Accomplishment", i.e. the tendency to evaluate oneself negatively, particularly with regards to one's work with clients. Teachers may feel unhappy about themselves and dissatisfied with their accomplishments on the job (Maslach and Jackson, 1986). Maslach and Jackson (1986) have provided an understanding of teacher burnout. However, it is suggested that critical dimensions of this phenomenon may have been missed, perhaps as a result of not including sufficient data from public school teachers in the original research and formulation of the burnout concept (Blase, 1982).

For the purposes of this study, the definition of burnout by Maslach and Jackson (1986) will be used, including the three components as described above, i.e Emotional Exhaustion, Depersonalization and feeling of low Personal Accomplishment. Thus, burnout is used as an umbrella term referring to three related, but loosely coupled, reactions to teaching.

Although most theories of burnout claim the sources of burnout to be either environment or individual, few have attempted to integrate the two. Recent literature, however, accepted that the source of burnout can be the result of individual, environment and organisational factors. The ecological model acknowledges this and
adopts a more systemic approach to burnout (Carroll and White, 1982).

2.4.3 The ecological perspective

According to Rutsch (1997) burnout is a work related concept, and the work environment therefore receives considerable attention in the literature. However, cognizance must be taken of the fact that other environments or ecosystems can and do play an important role in determining whether or not, to what degree, and in what fashion a person will experience burnout. The ecological perspective views burnout as a form of ecological dysfunction (Carroll and White, 1982). According to this perspective, ecology is concerned with the inter-relationship of organisms or ecosystems. Carrol and White (1982) go on to discuss that the person, his/her ecosystems, and the reciprocal impact each has on the other must be understood. By using the work of Bronfenbrenner (1979) one can depict the individual’s work environment as containing the person and environment components (i.e. microsystems, mesosystems, exosystems and macrosystems : Figure 5).

According to Bronfenbrenner (1979), the **microsystem** pertains to the smallest organised ecosystem within which the person performs most of his/her work (such as the office, home, classroom). The **mesosystem** represents the next level of organisation of the work environment. It encompasses all of the microsystems that together form a larger whole (e.g. all of the offices that comprise the business; or all the classrooms that make up the school.). The **exosystem** encompasses those elements of the larger environment that impinge most directly and frequently on the mesosystem. For example, a schools’ exosystem would include the school board, the surrounding community, and the local legislative bodies. The **macrosystem** includes elements that are larger, more impersonal, more distant and global than those of the micro-meso-and exosystems. The influence of the macrosystem, moreover, is often experienced more indirectly. Examples of macrosystem’s influences that may lead to burnout include economic conditions impacting on retrenchments rates, high interest rates, policy making and natural disasters (Carroll and White, 1982). Teachers are not
in the position to influence the above and feelings of frustration and burnout easily set in. The focus of this study is on the impact of change (at macrosystemic level) on the individual teacher at the micro level.

Figure 5

An ecological model for the analysis of burnout (Bronfenbrenner, 1979)

2.5 SOURCES OF TEACHER STRESS AND BURNOUT

The literature on the sources of occupational stress, teacher stress, and burnout cover similar areas and are often inter-linked. It is important for the purposes of this study to
<table>
<thead>
<tr>
<th>BROAD FRAMEWORK</th>
<th>EXAMPLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Factors intrinsic to the job</td>
<td>*poor physical working conditions, such as lack of teaching resources</td>
</tr>
<tr>
<td></td>
<td>*inadequate school buildings</td>
</tr>
<tr>
<td></td>
<td>*job overload - high teacher-pupil ratios, time pressure</td>
</tr>
<tr>
<td></td>
<td>*too much administrative work</td>
</tr>
<tr>
<td></td>
<td>*physical danger, increased crime and violence in schools.</td>
</tr>
<tr>
<td>Role in the organisation</td>
<td>*role ambiguity and role conflict</td>
</tr>
<tr>
<td></td>
<td>*responsibility for others and pupil’s needs.</td>
</tr>
<tr>
<td>Career development</td>
<td>*poor promotion prospects</td>
</tr>
<tr>
<td></td>
<td>*poor status in society</td>
</tr>
<tr>
<td></td>
<td>*lack of job security</td>
</tr>
<tr>
<td>relationships at work</td>
<td>*poor relationships with pupils</td>
</tr>
<tr>
<td></td>
<td>*poor relationships with community and parents</td>
</tr>
<tr>
<td></td>
<td>*lack of recognition of work done</td>
</tr>
<tr>
<td>organisational structure and climate</td>
<td>*lack of communication</td>
</tr>
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<td></td>
<td>*lack of participation in decision-making</td>
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<tr>
<td></td>
<td>*poor salaries and service conditions</td>
</tr>
<tr>
<td>School interface with home and society</td>
<td>*work-home interface: work overload affects home life.</td>
</tr>
<tr>
<td></td>
<td>*home-work interface: life changes affect work.</td>
</tr>
</tbody>
</table>

Table 1.

Sources of teacher stress and burnout (Rutsch, 1977, pp 29-30)
locate it within the teaching profession. Table no.1. was compiled using the work of Rutsch (1977). A broad framework to factors that may contribute to teacher stress and burnout is provided with specific examples.

2.6 CONSEQUENCES OF STRESS AND BURNOUT

According to Cedoline (1982), stress becomes a problem when it ceases to be a healthy stimulus and creates a burden that the individual cannot handle without harmful effect. This harmful type of stress is often referred to as "distress". Distress is seen as any perceived threat or discomfort that alerts the person and activates psychological and physiological responses (Cedoline, 1982). Stress could lead to mental ill health, job dissatisfaction, marital disharmony, coronary heart disease, tardiness, absenteeism, slow output, increase in stress related diseases, depression, apathy, high blood pressure, increased digestive acids, and faster breathing. Listed above are the consequences to the individual only (Cooper, 1983). There are also organisational consequences, such as cost due to absenteeism, lowered performance, low morale, increased medical bills (Bennett, 1989). The consequences of burnout are potentially very dangerous for the staff, the clients, and the larger institution.

According to Maslach and Jackson(1986), burnout can lead to a deterioration in the quality, care or service provided by the staff. The correlation of particular interest in this study is that of burnout and poor health. Burnout may result in a teacher desiring to relinquish teaching.

Kyriacou and Sutcliffe investigated the association between self-reported teacher stress and three responses related to job satisfaction, absenteeism and intention to leave teaching. They found a negative association between stress and job satisfaction, a positive association between stress and intention to leave. The association between self-reported teacher stress and frequency failed to reach significance. They found that 23.5% of their respondents indicated an intention to leave the profession.

When on the job change events occur in large numbers to people already working...
under highly stressful conditions, the incidence of sick leave, accidents and inattention to work increases rapidly. A study conducted by Marshall and Cooper (1981) on stress, asked their subjects to select major sources of organisational stress. They found that the similarity of selection, regardless of organisational type, was rather surprising. They found that change events or episodes which occur on the job are most stressful.

2.7 CONCEPT OF MENTAL HEALTH

In this study the concept of mental health will refer to the broad idea of mental well-being or psychological well-being. The concepts of mental health, mental well-being and psychological well-being are often used interchangeably. The definition put forward by Gerdes (1992) is most suitable: “mental health refers to the optimal development of a person’s potential and the effective coping with life-tasks and roles associated with a particular stage of life.” (p 41). Warr (1978) describes psychological well-being as a concept which is to do with people’s feelings about their everyday-life activities. Such feelings can range from negative mental states (dissatisfaction, unhappiness, worry etc...) to a positive outlook or a state called positive mental health. It is important to note at this stage that mental health in this context has no direct connection with mental illness in a clinical sense (Banks et al, 1980).

The instrument chosen to measure mental health in this study is the General Health Questionnaire (GHQ) (Goldberg, 1972) (3.4.1). This measures the inability to carry out one’s normal healthy functions and appearance of new reactions. This is ideal for the purposes of this study where one wants to determine the subjects’ mental health status and their reactions to the current changes in education. The instrument compromises a set of questions which form a ‘lowest common multiple’ of symptoms which will be encountered in the various differentiated syndromes of mental disorder (Banks and Jackson, 1982).
2.8 THE ISSUE OF TEACHER REDUNDANCY

In order to understand the potential impact of redundancy on individuals and their families one must first understand the meaning of work. Work not only provides one with an income but it also has latent consequences such as imposing a time structure, regularity, contact with colleagues, shared experiences, and it defines aspects of personal status and identity. Jenkins et al (1982), pointed out that it is these latent consequences of work which help one to understand the motivation to work and to understand why workers must be psychologically supported when these conditions arise.

Previous studies on the impact of unemployment focussed on descriptive and biographical accounts, with emphasis on the association between unemployment and low self-esteem, humiliation and on damage done to the families. More recent studies have shown that high rates of unemployment are shortly followed by high rates of admission to psychiatric hospitals, suicide and mortality in general (Jenkins et al. 1982). Unfortunately these links have not been investigated by other researchers.

Banks and Jackson (1982) revealed that GHQ scores were consistently higher for unemployed subjects and these subjects displayed an elevated probability of suffering from minor psychiatric disorders. They concluded that the experience of unemployment was more likely to create increased symptoms, rather than the other way round. Cox et al (1983) in their study on the assessment of well-being, found no fundamental gender differences in the experience and reporting of symptoms of ill-health.

According to Lewis (1935), cited in Jenkins et. al (1982), unemployment is a cause of poor mental health. It is also possible that those individuals with poor mental health are more likely to be unemployed than individuals in normal mental health. Owens, (1966) cited in Jenkins et. al (1982) demonstrated that the rate of sickness absence is consistently higher among men threatened by redundancy, especially in the period
immediately prior to closure.

In another important pioneer study, Kasl et al (1975), monitored changes in health in men whose jobs were lost through factory closure. The men were visited by a nurse a month before the factory closed, and two months, six months, one year and two years after closure. This study found that the anticipation period (of unemployment) might be most stressful. It was during this period that physical and psychological symptoms were most significant. By the time the discharged worker actually leaves a job he may already have paid the price in terms of deteriorating mental health.

In an explorative study Jenkins et al (1982) examined the effect of the threat of redundancy on the mental health of a group of professionals. They found a considerable reduction in minor symptomatology after the withdrawal of redundancy notices. The most common symptoms displayed were poor sleep, depression, fatigue, anxiety, poor concentration and irritability. They also reported that alcohol consumption levels were high, 25% of male journalists and 16% of female journalists.

Hepworth (1980), in her study on the psychological impact of unemployment, found that the well-being of the men studied was low. The scores on the GHQ of 62% of the sample indicated that they were at risk of suffering from non-psychotic disturbance.

Hepworth (1980) found that the 35-44 age group had the highest mean score on the GHQ (suggesting poor mental health). The age group 55-65 felt bitter that they had been ‘thrown on the scrap heap’ and were rather depressed, but others (who were nearing retirement age) welcomed unemployment for all the free time it offered.

2.9 REVIEW OF SOUTH AFRICAN STUDIES.

The following studies have specifically focussed on teacher stress in South Africa. All of these studies are in Kwa Zulu-Natal, mostly in the Pietermaritzbury region. The diversity and contrast within this region is vast and is entrenched in the history of
different education departments for the various races. All these studies are recent.

2.9.1 South African studies on teacher stress.

**Rutsch (1997)** used the Maslach Burnout Inventory (MBI) in an exploratory study of the relationship of demographic and personality factors to burnout in high school teachers in the Pietermaritzburg area. Rutsch (1997) used a predominantly white sample. The current changes and restructuring in education might have impacted on these teachers as well. Rutsch (1997) found that younger teachers were more prone to burnout than older teachers; males and females did not appear to differ in their experiences of burnout.

**Moodley (1995),** studied burnout among teachers in the period just prior to circulation of the Right Sizing document(Appendix one). This study focussed on Indian teachers in Kwa Zulu-Natal. Although changes in education had begun, major changes came later. The primary aim of his study was to ascertain whether teacher burnout is accompanied by physiological, psychological and behavioural symptoms. Moodley (1995), as background to his study, presented two important points. Firstly he pointed out a steady increase over the years in the number of teachers applying for medical boarding, thus indicating a steady decline in the general health, both physically and psychologically (Table 2.).

<table>
<thead>
<tr>
<th>TABLE</th>
<th>NUMBER OF APPLICANTS FOR MEDICAL BOARDING</th>
<th>NUMBER OF MEDICAL BOARDINGS GRANTED</th>
</tr>
</thead>
<tbody>
<tr>
<td>1990</td>
<td>52</td>
<td>41</td>
</tr>
<tr>
<td>1991</td>
<td>55</td>
<td>46</td>
</tr>
<tr>
<td>1992</td>
<td>102</td>
<td>93</td>
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<tr>
<td>1993</td>
<td>356</td>
<td>229</td>
</tr>
<tr>
<td>1994</td>
<td>277</td>
<td>130</td>
</tr>
</tbody>
</table>

**Table 2**

Medical boarding statistics (Moodley, 1995 p 5).
Secondly he noted that the education system in South Africa has as one of its pre-employment requisites for teachers (like all other public and civil servants) the completion of the Health Questionnaire, 81/97850 (Z 27), (Appendix three). Thus teachers supposedly began teaching in most cases with a clean bill of health. It was the impact of their job conditions which probably contributed to the current levels of stress, burnout and mental health status. His study revealed interesting results: teacher burnout is accompanied by distinct physiological, psychological and behavioural symptoms. Fatigue, muscular pain, headaches, sleep disturbances, colds, leg cramps, chest pains, not being appreciated in the job, tenseness, moodiness, anger, irritability, boredom, depression, consumption of caffeine, cannot enjoy leisure, giving up the job, fault finding, and isolation correlated significantly with burnout. Psychological consequences tended to predominate over physiological and behavioural consequences.

Rigby (1989), as part of her study on stress inoculation training on teacher stress, attempted to identify stressors. For this aspect of her study, she used teachers in the Pietermaritzburg area. Rigby (1989) found that task overload was identified as a top priority cause for teacher stress. The second primary cause was thwarted ambition and teacher’s perception of the assessment method as being ‘unfair’. The third stressor identified was the responsibility for others. This included the responsibility for educating, disciplining and motivating pupils. Black teachers identified societal pressure as affecting them. This included legislation, financial pressure, poor working conditions, the political awareness of pupils, boycotts, riots and police intervention. Many of the stressors identified may be difficult to change within the bureaucratic organizational structure.

de Haas (1995) in her writings on the integration of schools in South Africa and the increasing stress on teachers, also examined the sources of stress at this time of rapid change. In particular she examined stress relating to class management, teaching practice and structural issues within the school system. The aspect of structural issues is of relevance to this study. According to de Haas (1995) structural issues may lead to
teachers feeling angry and/or dis-empowered. At the core of these issues lies the authoritarian and hierarchical system of educational administration. Teachers often feel that they have been given far too little information, with little or no consultation. Departments of Education gave very little in the way of guidance in the process of change, and in many cases the schools themselves had to take the lead.

2.9.2 South African studies using the General Health Questionnaire (GHQ)

There are a few studies that have employed the General Health Questionnaire (GHQ) with South African samples. Although none of these studies have used the GHQ on a sample of teachers, Leeb’s study seemed most relevant.

Leeb (1986) used the GHQ to evaluate the psychological impact of unemployment. She administered a Zulu translation of the 30-item version to a black working class sample in Kwa Zulu-Natal. Leeb (1986) found that her scores were high, indicating poor health status. She divided her sample into three groups on the basis of their total GHQ scores (Table 3).

<table>
<thead>
<tr>
<th>Group</th>
<th>those scoring</th>
<th>Categorisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>one</td>
<td>1 - 10</td>
<td>‘normal’</td>
</tr>
<tr>
<td>two</td>
<td>11 - 20</td>
<td>‘moderately distressed’</td>
</tr>
<tr>
<td>three</td>
<td>21 - 30</td>
<td>‘severely distressed’</td>
</tr>
</tbody>
</table>

Table 3
Categorisation of GHQ scores (Leeb, 1986, p. 7)

John (1996) translated the GHQ into Zulu. He used 257 bilingual high school students. The sample of this study scored much higher on the GHQ than foreign samples. John (1996) suggested raising the cut off score for South African samples. About 75% of the sample scored over 5 on the English version and 72% scored over 5 on the Zulu version. Pillay et al (1992) did not report a mean GHQ score but state that 94.4% of primary caregivers from a conflict-ridden area scored above 4. O’Neil
in her study with shop stewards found a mean GHQ score of 10.00 using the 30-item version. This is almost identical to the findings of John (1996).

2.10 Rationale for this study

Teachers are constantly exposed to reorganisation and change. The pace of this change is accelerated in Kwa Zulu-Natal at the present time. The stress related to change is a compounding factor to the other inherent stressors in teaching. An assessment of teacher stress levels, burnout and mental health status during a period of rapid change might be used to inform the education authorities of the concomitants of this change and ultimately assist in developing effective stress-management programmes. Results from this study could be used to prepare teachers more effectively for future changes and enable administrators to anticipate the correlates of change.
CHAPTER THREE

METHODOLOGY

3.1 INTRODUCTION

The theoretical considerations in the previous chapter provided the base on which to build the research design. In this chapter a description of the research methodology is presented. This includes a description of the sample, procedure of the research, psychometric instruments used and discussion on the self-administered questionnaire.

3.2 RESEARCH AIMS

The education system was and still is undergoing vast changes in the post apartheid era. Redundancy, redeployment and reorganisation are the current buzz words. But how has all this affected teachers? The aim of this study was to determine teachers’ stress levels, incidence of burnout and mental health status during a period of major transformational change. These issues will be examined in terms of teacher age, gender and post-level. A further aim was to determine teachers’ perceptions of the current changes and reorganisation in education. The research design is a descriptive study with a cross-sectional design. A sample of teachers (3.3), were given a questionnaire (3.4) to respond to, i.e self-reporting. The questionnaire included two standardised psychometric instruments viz. the General Health Questionnaire (Best 30 item version) and the Maslach Burnout Inventory. The questionnaire also included a section on Redundancy and Reorganisation Issues.

In the present study the General Health Questionnaire (GHQ) (Goldberg, 1972) was used to measure mental health status. The GHQ identifies a disturbance in normal health rather than lifelong psychiatric disturbance. Its purpose is to show an inability to continue to carry out one’s normal “healthy” functions and the appearance of new phenomena of a distressing nature. In this study the distressing factor could be the current changes in education. The change involves the possibility of redundancy,
redeployment, right-sizing and severance packages

Teachers have a limited ability to change, often because they feel threatened. Teachers may feel that they have developed a stake in the status quo and then view change as a motion of no confidence in their work (Theron, 1996). No change occurs without sacrifice and adjustment; resistance to change forms an integral part to the whole process of change. The purpose of the present study is to determine the mental health status (psychological well being) of teachers during this time of change. A high score would indicated poor psychological well being. In this study the poor mental health (psychological well-being) could be caused by the reorganisation, change and redeployment in education. The GHQ scores from this sample will be analysed using Goldberg’s (1972) cut-off score of 3 - 4. The subjects used in the GHQ standardisation study ranged from severely ill to normal. Subjects were classified into three calibration groups, namely: “normals”, “mildly ill” and “severely ill”. Demographic information of Goldberg’s sample are presented in Appendix 5.

The Maslach Burnout Inventory (MBI) (Maslach and Jackson, 1986) was used to measure teachers’ stress and burnout levels during this time of change. The MBI uses three subscales, Emotional Exhaustion (EE), Depersonalization (DP) and Personal accomplishment (PA) to determine burnout levels. Chronic stress can be emotionally draining and can lead to burnout. (Maslach and Jackson, 1986). The consequences of burnout are potentially very dangerous for the pupils, teachers and the entire education system, since burnout can lead to a deterioration in the quality of service provided by the staff. The scores of the three subscales (Emotional Exhaustion, Depersonalization and Personal Accomplishment) of the MBI from this study are compared with the norms reported in the standardization study (Maslach and Jackson, 1986). Demographic information on the subjects used in the standardization study (Maslach and Jackson, 1986) is supplied in Appendix 6.

Teachers’ perceptions of redundancy and reorganisation were obtained by asking teachers to respond to nine items designed by the researcher. Eight of these were
structured as statements while the ninth was an open ended question. Responses to these will also be presented.

### 3.2.1 Research hypotheses and aims

1. The overall GHQ scores of this sample are expected to be higher than Goldberg's (1972) cut-off score of between 3 - 4 ( +5 indicates high distress level), in view of the situation these respondents are facing.

2.1 The GHQ scores for this sample of females are expected to be higher than the standardised norms of females (Goldberg, 1972).

2.2 The GHQ scores for this sample of males are expected to be higher than the standardised norms for males (Goldberg, 1972).

2.3 To determine whether significant differences in mental health, as measured by the GHQ (Goldberg, 1972) exist between males and females of this sample.

3. To determine whether significant differences in mental health as measured by the GHQ (Goldberg, 1972) exist among the three age categories of this sample.

4. To determine whether significant differences in mental health as measured by the GHQ (Goldberg, 1972) exist between those at post level one and those above post level one.

5. To determine whether there would be significant differences between the standardised norms for each of the three subscales of the MBI (Maslach and Jackson, 1986) and the scores of this study.

5.1 To determine whether there would be significant differences between the standardised norms for each of the three subscales of the MBI (Maslach and Jackson, 1986) and the scores of this study.

5.2 To determine whether any significant correlations exist among the three subscales of the MBI for this sample.

6.1 It was predicted that there would be a statistically significant difference between the standardised norms of females, for each of the three subscales of the MBI (Maslach and Jackson, 1986) and the scores of the females from this study.

37.
6.2 It was predicted that there would be a statistically significant difference between the standardised norms of males, for each of the three subscales of the MBI (Maslach and Jackson, 1986) and the scores of the males from this study.

6.3 To determine whether there would be significant difference in each of the three subscales of the MBI (Maslach and Jackson, 1986) exist between males and females of this sample.

7. To determine if any significant differences are found for each of the three subscales of the MBI (Maslach and Jackson, 1986) and among the age categories of this sample.

8. To determine whether significant differences are found for each of the three subscales of the MBI (Maslach and Jackson, 1986) for those at post-level one and for those above that post level.

3.3 SAMPLE

The population from which the subjects of this study were taken, is teachers from urban government primary and secondary schools in the Pietermaritzburg north region. An intact sample from this population was chosen for reasons of convenience and easy accessibility, since they were in close proximity to the researcher's place of residence. A total of 10 schools participated in the study with a total complement of 217 teachers. Teachers, principals, deputy principals and heads of departments were invited to participate by completing the questionnaire.

Since this study's proposed subjects were teachers, permission had to be sought from the principal of each school, the teaching staff and the relevant authorities to carry out the research. A letter requesting permission from the Kwa Zulu-Natal Department of education to proceed with this research is included as Appendix four. Once this permission was granted by the relevant authorities, initial contact was made with the schools. Appointments were set up with the principals and the staff representatives of
twelve schools. During each meeting the aims and objectives of the project were discussed, and the length of the questionnaire and the amount of time needed were conveyed. Subsequently the staff representative approached the staff to obtain their consent to participate as subjects in the research. Twelve schools were approached in this manner. The teachers from two (secondary) schools declined to participate. Additional demographic information on the teachers’ age, gender and post-level can be found in Chapter 4.

3.4 PSYCHOMETRIC INSTRUMENTS

The data for this study were obtained exclusively by self-report questionnaires. Other methods of data collection that were considered were, the interview, indirect observation and reports from principals. One could have also examined teachers’ medical reports and absentee rates. These methods were not used as they would intrude into the subjects’ personal and confidential domain and this could be threatening to the subjects. Time constraint was also an issue and thus it was decided that the best method of data collection for this study was the self-report questionnaire. This method of data collection, is known to be one of the more reliable and valid technique of data collection (McMillan and Schumacher, 1993). Advantages of self report questionnaires are that they are relatively economical, have standardised questions, questions can be written for specific purposes, can ensure anonymity, and they are easy to administer and score.

There are many disadvantages regarding the use of self-report questionnaires. The first criticism is about the structure and content of the questionnaire and the second is around the respondents. A well structured questionnaire should be clear, free of ambiguity, avoid double-barrel questions and the avoid of biased items or terms. Thus a well structured questionnaire can reduce these problems. Fortunately in this study the questionnaire consisted mainly of standardised questions. The second criticism involves the respondents, who may want to please the researcher and will provide responses they think the researcher wants. The subjects’ defensiveness can
influence their responses. Goldberg (1972) argues that defensiveness is an intrapsychic process, and individuals may be reluctant to reveal their inner experiences to other people. Another disadvantage is that the respondents may be influenced by what they feel is socially desirable. This may be particularly true in a study such as this where teachers may want to give the impression that they are coping well and may not admit to feeling burnt out (Rutsch, 1997).

Despite these disadvantages, self-report questionnaires were chosen as the method of data collection for this study. These shortcomings can only be addressed and reduced but not eliminated, by careful briefing of the clients and proper administration of the questionnaire. It was also decided that the researcher would administer and collect the questionnaires personally. This ensured a high response rate.

The questionnaire that was designed for this study included two psychometric instruments in order to investigate the mental health status and burnout levels. (Appendix 2). The questionnaire consisted of: General Health Questionnaire (thirty question version) by Goldberg (1972), Maslach Burnout Inventory (Maslach & Jackson 1986) and a section on Redundancy and Reorganisation issues.

What follows is a discussion on the three sections of the questionnaire. The discussion will include the validity and reliability of each of the psychometric measures used.

3.4.1 The General Health Questionnaire (GHQ)

The GHQ is a mental health instrument developed by Goldberg and published in 1972. It is a self-administered screening device designed for detecting diagnosable non-psychotic psychiatric disorders. The GHQ is concerned with two major features, the inability to carry out one’s normal healthy functions, and the appearance of new reactions of a distressing nature. It thus measures two important aspects of mental health which are relevant to this study. Where information is being sought on the impact of current changes in education (the appearance of new reactions of a
distressing nature) on teachers' mental health (the inability to carry out one's normal healthy functions) status. In this study the GHQ was used to measure mental health status (psychological well being) during a time of change in education.

Goldberg (1972) describes the context in which the GHQ was developed as one of growing interest amongst psychiatric epidemiologists to measure the prevalence of non-psychotic illness in the community. The period was also marked by a growing interest in "community psychiatry", a move towards providing clinical care to individuals and population groups in a community setting rather than in psychiatric institutions. Goldberg (1972) states that the aim of his project was to devise a self-administered questionnaire that would identify respondents with non-psychotic psychiatric illness, by assessing the severity of their psychiatric disturbance.

3.4.1.1 Scoring of the GHQ

To achieve its aim of detecting non-psychotic psychiatric illness at the time it is completed, the GHQ assesses the way the respondent has felt, thought and behaved in the time leading up to the occasion on which it is completed. Respondents are asked to compare the extent of their current experience of each item with the extent to which it is usually experienced. The item is scored as being present only if it is being experienced "more than usual" (Goldberg 1972). This means that the questionnaire should give information only about the current mental state, so that a respondent should score high if the questionnaire is completed during a period of illness, but low if it is completed during a period of health (Goldberg, 1972).

This focuses the measurement away from long-term possession of neurotic traits. Thus two phenomena are measured, one being the emergence of a new distressing phenomena and the other being the inability to continue one's normal healthy functions. According to Goldberg (1972) the focus of the GHQ is on the present, at the expense of the past and the future. The questionnaire thus differs from most existing scales, which in the main aim to give information about their respondents which is fairly
constant over time.

The GHQ can be scored in two possible ways as described by Goldberg (1972). The first method involves each item having a four-point response scale ranging from 'not at all' to 'much more than usual', known as the Likert scoring method. The second method is the binary method of each item being scored either 0 or 1, which is referred to as the GHQ scoring method. For the purposes of this study, it was decided to use the GHQ scoring system. Reliability and validity test (Goldberg, 1972) on the use of the two methods of scoring revealed that of the five reliability and validity coefficients, two were slightly better and three were slightly worse if the Likert scoring method was used, Appendix 8. This study follows the procedure adopted by Leeb (1986), O’Neil (1988), and John (1996) in using the GHQ as a binomial scale. Scoring is done by allocating a score of 1 for an unhealthy response and a score of 0 for a healthy response with a maximum score of 30. Thus a high score would indicate low (poor) general health or illness and zero represents the 'normal' end of the scale.

3.4.1.2 Reliability

The reliability and validity of the GHQ have been well established for the general population (Goldberg, 1972). The GHQ in the 30 best item version has a reliability coefficient of 0.92, when scoring according to the GHQ method used in this study.

Slight variations in reliability and validity are reported by Goldberg (1972) depending on the method of scoring used. (See 3.4.1.1 and Appendix 8)

Since the development of the GHQ, studies have reported the successful use of the GHQ in several occupational settings. Banks et al (1980) found the GHQ to be psychometrically sound in three studies employing large samples of employees in an engineering firm, recent school leavers, and unemployed men. Jenkins, MacDonald, Murray and Strathdee (1982) used the GHQ in examining the mental health effects of the threat of redundancy in a professional group.
3.4.1.3 Validity

In general, the GHQ, in its original English version and in its various translated versions has been shown to possess good validity as a first stage screening device (John, 1996). Leeb (1986) stated that the GHQ is well suited to the South African situation because it has been proven to be effective over most populations and not to differ significantly when affected by variables such as race, age or sex.

The GHQ has been subsequently used in community and other psychological research.

3.4.2 The Maslach Burnout Inventory (MBI).

The MBI was chosen as a psychometric measurement for occupational stress and burnout, since it measures burnout in human service workers. According to Belcasto, Gold and Hays (1983), the MBI is a, “sound tool (psychometric) for measuring burnout or occupational stress.” (p 364).

They also report that the inventory is not simply another index of job satisfaction but measures an additional construct of stress that is particular to occupational stress. The MBI is based on the concept of burnout as a syndrome, a progressive response that occurs over time as a direct result of working in a helping relationship. Research indicates that the inventory provides a psychometrically sound tool for measuring burnout and particularly for measuring occupational stress(Belcastro, Gold and Hays, 1983)

The inventory is designed to measure three aspects of the burnout syndrome, each measured on a separate subscale. They are Emotional Exhaustion, Depersonalization, and lack of Personal Accomplishment. The first subscale, Emotional Exhaustion,(EE) is assessed in terms of the subjects' subjective experiences of emotional over-extension, and general work exhaustion. The second, Depersonalization, (DP) subscale assesses the level of emotional detachment and impersonal response patterns of the
subject in relation to her/his recipients (in this case pupils). The third, Personal Accomplishment, (PA) subscale measures the subjects' feelings of competence and success in their work with people. The MBI was presented in its original form (Maslach, 1981).

The three sub-scales of the MBI, have been found to be highly reliable with good attention to validation criteria. (Jones, 1981 cited in Arthur 1990). Developing valid instruments to measure burnout is an important consideration in research. Perlman and Hartman (1982) cited in Arthur (1990) suggested the use of the MBI in combination with other instruments.

3.4.2.1 Scoring

The MBI takes about 10 to 15 minutes to fill out and contains 22 items. Respondents are asked to rate each item according to the intensity and frequency of their experience. The frequency that the respondent experiences feelings related to each subscale is assessed using a seven point response format. (i.e. 0 = never; 1 = a few times a year; 2 = once a month or less; 3 = a few times a month; 4 = once a week; 5 = a few times a week; 6 = everyday), using an anchored response format (Maslach and Jackson 1981 c), thus creating a more standardised response scale.

The Personal Accomplishment sub-scale is scored in the opposite direction: a high score on personal accomplishment indicates a low level of burnout.

Scoring is done using a scoring key which indicates responses must be added to obtain a score for each subscale. Numerical cut-off points are presented by Maslach and Jackson (1981c) for subjects in teaching, post-secondary education, social services, medicine, mental health, and others. Table 4, categorises the MBI scores according to low, average or high (used only for teachers): 44.
Table 4
Categorisation of MBI Scores for teachers (Maslach and Jackson, 1981c, p 3)

<table>
<thead>
<tr>
<th></th>
<th>NUMBER OF ITEMS</th>
<th>LOW</th>
<th>MODERATE</th>
<th>HIGH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emotional exhaustion</td>
<td>9</td>
<td>0 - 16</td>
<td>17 - 26</td>
<td>27 and over</td>
</tr>
<tr>
<td>Depersonalisation</td>
<td>5</td>
<td>0 - 6</td>
<td>7 - 12</td>
<td>13 and over</td>
</tr>
<tr>
<td>Personal Accomplishment</td>
<td>8</td>
<td>39 and over</td>
<td>32 - 38</td>
<td>0 - 31</td>
</tr>
</tbody>
</table>

For statistical analysis, the original numerical scores were used rather than the categorisation of low, moderate and high.

Maslach and Jackson (1981c) see burnout as a continuous variable ranging from low to moderate to high degrees of burnout. As measured by the Maslach Burnout Inventory, a high degree of burnout is reflected in high scores on the Emotional Exhaustion and low scores in the Personal Accomplishment subscale.

3.4.2.2 Reliability

Reliability coefficients for the MBI were based on subjects who were not involved in the item selection procedures. The various subscales were found to have the following reliability coefficients: EE = .90; DP = .79; and PA = .71, and are found to be acceptable coefficients (i.e., above .65). In terms of test-retest reliability the findings, based on a sample of 53 are as follows: EE = .82; DP = .60 and PA = .80. All of these are significant beyond the .001 level (Maslach and Jackson 1981c).
3.4.2.3 Validity

Maslach and Jackson (1981c) discuss both the convergent and discriminant validities of the MBI. The former was demonstrated in three ways. The first involved a correlation between subjects' scores on the MBI and an independent behavioural rating made by people who knew the subjects well. The second involved the correlation of subjects' MBI scores with a measure of the presence of specific occupational characteristics that are believed to contribute to the burnout experience. The third correlation was between MBI scores and measures of various outcomes that have been hypothesized to be related to burnout (Maslach and Jackson (1981c) p. 10). Almost all of these correlations proved to be significant confirming the validity of this test as a measure of burnout.

Discriminant validity was obtained by distinguishing it from measures of other psychological constructs which might be presumed to be confounded with burnout (Maslach and Jackson, 1981c p 10). Low correlations between these burnout subscales and other measures of job satisfaction were found when reviewing studies conducted with lawyers, rehabilitation workers and mental health workers (Arthur, 1990).

In terms of the possible confounding effect of social desirability, it was found that none of the MBI subscales correlated significantly with the Crowne-Marlowe Social Desirability Scale at the 0.05 level (Belcastro, et al, (1983) and Arthur, 1990).

3.4.3 Redundancy and Reorganisation Issues

This section was constructed by the researcher, and it consisted of three parts. The first was designed to gather demographic data, where subjects were asked to supply data concerning their age, gender, and post level. The second part was designed to gain information around the subjects' perception of reorganisation, change and possible redundancy in education. This section consisted of eight items. The subjects
were asked to rate a given statement on a five point scale, ranging from Strongly agree, Agree, Uncertain, Disagree and Strongly Disagree. The rating scale values are clearly specified on the test form. The third part was an open ended question, "The uncertainty about my career as a teacher has .......". This item was included to elicit information that the researcher might not have touched on or missed in the research.

3.5. PROCEDURE

Once permission from the Kwa Zulu- Natal Department of Education was obtained, arrangements were made with each of the ten schools to administer the questionnaire to the teachers. All work undertaken was outside of instruction time. Teachers were asked to stay in after school for an approximately 30 minutes session to complete the questionnaire.

Each session commenced with a brief presentation. This included an outline of the nature of the study, assurances of confidentiality and all the necessary information to complete the questionnaire. The subjects were informed that they would not have to fill their names on the questionnaire (to ensure confidentiality), that participation was voluntary and that the results would only be used for research purposes. Subjects were asked not to discuss any of the items with their colleagues. They had to complete the questionnaire in one sitting and no time limit was imposed. The questionnaire was to be handed back to the researcher once completed. Minor administrative problems and the practical details regarding the completion of the questionnaire were resolved immediately as the researcher was present throughout the session. The researcher was also available directly after each session for questions and comments. The researcher offered subjects an opportunity to discuss any unresolved issues or anxiety after completing the questionnaire. None of the subjects took up this offer. Finally, the subjects were thanked for their participation in the study.

This chapter began with a discussion of the research design, the sample used and the choice of Psychometric instruments. The validity and reliability of these instruments...
was described. This chapter ended with a report on the procedures of data collection.

Chapter four consists of the results obtained and a description of the statistical procedures used for the analysis of the data.
CHAPTER FOUR

RESULTS

4.1 INTRODUCTION

This chapter presents the results obtained and describes the statistical procedures used in the analysis of these results.

The demographic data, MBI scores and GHQ scores were tabulated to facilitate analysis. The responses from the Redundancy and Reorganisation section were individually analysed to seek out issues that are causing stress and burnout in teaching. This was also done to gather information on teachers’ perception of reorganisation and change in education. The data will be analysed with regard to the issues identified in Chapter Two and specifically with regard to the research questions, listed under 3.2 in Chapter Three. All statistics were calculated using the Statistical Package for Social Sciences (SPSS-X, 1997).

The interpretation is divided into the following sections:

4.2. Descriptive data

4.3. Presentation of the results of the GHQ in terms of the research questions 1-4

4.4. Presentation of the results of the MBI in terms of the research questions 5-10.

4.5. Responses to the Redundancy and Reorganisation questions.

4.6 Analysis of responses to the open ended question.

4.7 Summary of results.

The implications of the findings are discussed in Chapter Five.

4.2 DESCRIPTIVE DATA

4.2.1 Ages of respondents

The ages of the respondents ranged from 20 years to over 41 years. The data for ages...
of the respondents were collected according to three age categories. Of the total sample 30.85% were between the ages of 20-30 years; 48.3% were between 31-40 years old and 20.9% were over 41 years old. Table 5 illustrates the above information:

<table>
<thead>
<tr>
<th>Age Categories</th>
<th>Percentage</th>
<th>n</th>
</tr>
</thead>
<tbody>
<tr>
<td>20 to 30 years</td>
<td>30.8</td>
<td>62</td>
</tr>
<tr>
<td>31 to 40 years</td>
<td>48.3</td>
<td>97</td>
</tr>
<tr>
<td>41 years and over</td>
<td>20.9</td>
<td>42</td>
</tr>
</tbody>
</table>

n = 201 (missing cases 16)

Table 5
Age distribution total sample

4.2.2 Gender

The sample was characterised by an unequal proportion of 55.8% females and 44.2% males. This is shown in Table 6.

<table>
<thead>
<tr>
<th>GENDER</th>
<th>PERCENTAGE</th>
<th>n</th>
</tr>
</thead>
<tbody>
<tr>
<td>MALES</td>
<td>44.2</td>
<td>95</td>
</tr>
<tr>
<td>FEMALES</td>
<td>55.8</td>
<td>120</td>
</tr>
</tbody>
</table>

n = 215 missing cases = 2

Table 6.
Gender distribution of total sample

4.2.3 Post-Level

All principals, senior deputy principals, deputy principals and heads of departments were regarded as “Management” and were categorised as post level two and over, for the purposes of this study. All post level one personnel were “Teachers”. Teachers at post level one constituted 90.1% of the respondents, while 9.9% of the respondents
were at Management level (Table 7).

<table>
<thead>
<tr>
<th>POST LEVEL</th>
<th>PERCENTAGE</th>
<th>n</th>
</tr>
</thead>
<tbody>
<tr>
<td>POST LEVEL ONE</td>
<td>90.1</td>
<td>191</td>
</tr>
<tr>
<td>POST LEVEL TWO</td>
<td>9.9</td>
<td>21</td>
</tr>
</tbody>
</table>

n = 212 missing cases = 5

Table 7.
Post-Level distribution of total sample

4.3 GENERAL HEALTH QUESTIONNAIRE (GHQ)

The data pertaining to the GHQ were computed using the GHQ method of scoring (see Chapter 3.4.1.1) in order to address Research Questions 1 to 4.

Research Question One

1. The overall GHQ scores of this sample are expected to be higher than Goldberg's (1972) cut off score of between 3-4 (a score above 4 indicates high distress level.), in view of the situation these respondents are facing.

Of the 217 questionnaires administered, only 199 of the respondents completed this section. The other 18 had no response for this section. The GHQ mean for this sample was 22.7, the Standard Deviation was 1.4. A mean of 22.7 from this study indicates a "severely distressed" sample (Table 8). The Standard deviation of 1.4 indicated the sample was consistent in their responses with little variability.

<table>
<thead>
<tr>
<th>MEAN = 22.7</th>
<th>STANDARD DEVIATION = 1.4</th>
</tr>
</thead>
<tbody>
<tr>
<td>n = 199</td>
<td></td>
</tr>
</tbody>
</table>

Table 8.
GHQ mean and standard deviation for this study
In the development studies of the GHQ, Goldberg (1972) used a cut off score of 3 or 4 for the GHQ-30. A person scoring above this was considered to be a ‘case’ (indicating high level of distress). If Goldberg’s (1972) cut-off score was employed for the present study, all of the respondents would be classified as severely distressed (Table 9). The lowest score is 19.5 and the highest score is 27. Thus the GHQ scores of the present study are extremely high scores for teachers at that point in time, indicating high distress levels and poor mental health status.

<table>
<thead>
<tr>
<th>GHQ SCORE</th>
<th>FREQUENCY</th>
</tr>
</thead>
<tbody>
<tr>
<td>19.5</td>
<td>2</td>
</tr>
<tr>
<td>20</td>
<td>3</td>
</tr>
<tr>
<td>20.5</td>
<td>8</td>
</tr>
<tr>
<td>21</td>
<td>6</td>
</tr>
<tr>
<td>21.5</td>
<td>22</td>
</tr>
<tr>
<td>22</td>
<td>26</td>
</tr>
<tr>
<td>22.5</td>
<td>49</td>
</tr>
<tr>
<td>23</td>
<td>24</td>
</tr>
<tr>
<td>23.5</td>
<td>19</td>
</tr>
<tr>
<td>24</td>
<td>10</td>
</tr>
<tr>
<td>24.5</td>
<td>11</td>
</tr>
<tr>
<td>25</td>
<td>5</td>
</tr>
<tr>
<td>25.5</td>
<td>7</td>
</tr>
<tr>
<td>26</td>
<td>3</td>
</tr>
<tr>
<td>26.5</td>
<td>1</td>
</tr>
<tr>
<td>27</td>
<td>3</td>
</tr>
</tbody>
</table>

n = 199, missing cases = 18

Table 9. GHQ scores and frequency.

52.
Research Question Two

2.1 The GHQ scores for this sample of females are expected to be higher than the standardised norms of females (Goldberg, 1972).

2.2 The GHQ scores for this sample of males are expected to be higher than the standardised norms for males (Goldberg, 1972).

<table>
<thead>
<tr>
<th>GENDER</th>
<th>MEANS - NORMS</th>
<th>STANDARD DEVIATION NORMS</th>
<th>MEANS - SAMPLE</th>
<th>STANDARD DEVIATION SAMPLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>MALES</td>
<td>3.42</td>
<td>4.89</td>
<td>22.73</td>
<td>1.3791</td>
</tr>
<tr>
<td>FEMALES</td>
<td>4.73</td>
<td>5.94</td>
<td>22.76</td>
<td>1.4399</td>
</tr>
</tbody>
</table>

\[ Z = 60.062 \quad p < 0.001 \text{ (Males)} \quad Z = 20.403 \quad p < 0.001 \text{ (Females)} \]

Table 10.

Comparison of Gender scores between the norms (Goldberg, 1976, p 141) and the scores of the current study.

In order to calculate significance, Z-tests were carried out. The scores for females of this sample were significantly higher than the scores of the standardised norms for females. Also the scores for males of this sample were significantly higher than the standardised norms for males (Table 10). Scores for both genders indicated poor mental health status and high levels of distress \((p < 0.001)\).

Research question 2.3

2.3 To determine whether significant differences in mental health, as measured by the GHQ (Goldberg, 1972) exist between males and females of this sample.

Analysis of variance was computed to determine whether significant differences existed for research question 2.3. The value of \( f = 0.560 \) indicates that there is no significant difference in GHQ scores between males and females of this sample \((p > 0.05)\).
Research Question Three

3. To determine whether significant differences in mental health as measured by the GHQ (Goldberg, 1972) exist among the three age categories of this sample.

The data for this question were analysed using a one way analysis of variance. The results are tabulated below in Table 11.

<table>
<thead>
<tr>
<th>AGE 20 - 30 YEARS</th>
<th>MEAN SCORE 22.63</th>
<th>n = 56</th>
</tr>
</thead>
<tbody>
<tr>
<td>AGE 31 - 40 YEARS</td>
<td>MEAN SCORE 22.57</td>
<td>n = 90</td>
</tr>
<tr>
<td>AGE 41 YEARS AND OVER</td>
<td>MEAN SCORE 23.35</td>
<td>n = 37</td>
</tr>
</tbody>
</table>

\[ f = .011 \]

Table 11.

Age differences in mean GHQ scores.

There was no significant difference among the three age categories at the 0.05 level. The mean score for the age group over 41 years was slightly higher than those of the other two age categories (Table 11).

Research Question Four

4. To determine whether significant differences in mental health as measured by the GHQ (Goldberg, 1972) exist between those at post level one and those above post level one.

When it came to post level and GHQ scores no significant differences were found using analysis of variance. The scores are tabled below (Table 12).
Table 12.
Post level differences in GHQ scores.

4.4 MASLACH BURNOUT INVENTORY (MBI)

MBI scores were computed as discussed in Chapter Three section 3.4.2.1, and the following results were noted.

Table 13.
Means and Standard Deviations for the MBI subcales.

Table 14.
MBI norms (Maslach and Jackson, 1986 p 9).
Research Question Five

5.1 To determine whether there would be significant difference between the standardised norms for each of the three subscales of the MBI (Maslach and Jackson, 1986) and the scores of this study.

Differences between the norms for each of the three subscales (Maslach and Jackson, 1986) and the scores of the three subscales of this sample (Table 13 and Table 14) were examined by using a Z-test at the level of significance indicated below. The results are as follows:

* The scores Emotional Exhaustion of the respondents from this study are significantly higher than the norms from the standardised study (Maslach and Jackson, 1986) \( (Z = 2.007 \text{ and } p < 0.05) \).

* The scores for Depersonalisation of the respondents from this study are significantly lower than the norms from the standardisation study (Maslach and Jackson, 1986). \( (Z = 9.7613 \text{ and } p < 0.01) \).

* The scores for Personal Accomplishment of the respondents from this study are significantly higher than the norms from the standardisation study (Maslach and Jackson, 1986) \( (Z = 4.778 \text{ and } p < 0.01) \).

The means of the sample thus reflect a higher score (than the norms) in Personal Accomplishment thus indicating a low level of burnout and a greater sense of personal accomplishment. The significant higher score for Emotional Exhaustion of this sample describes feelings of being emotionally overextended and exhausted by one's work. The significantly lower score (than the norms) for Depersonalisation suggests a humane and positive relationship with the pupils.

Research Question 5.2

5.2 To determine whether any significant correlations exist among the three subscales of the MBI for this sample.
Pearson's correlation was used in order to address this research question. Significant correlations were found between EE and DP ($r = .6121$) as well as DP and PA ($r = - .3039$) at the $p< 0.01$ level. All other correlations were not significant.

Research Question Six

6.1 It was predicted that there would be a statistically significant difference between the standardised norms of females, for each of the three subscales of the MBI (Maslach and Jackson, 1986) and the scores of the females from this study.

6.2 It was predicted that there would be a statistically significant difference between the standardised norms of males, for each of the three subscales of the MBI (Maslach and Jackson, 1986) and the scores of the males from this study.

The mean scores for each of the three subscales for gender, for this study are presented below in Table 15, followed by the standardised norms for the three subscales of the MBI (Maslach and Jackson, 1986), (Table 16).

<table>
<thead>
<tr>
<th></th>
<th>EE MEANS</th>
<th>EE SD</th>
<th>DP MEANS</th>
<th>DP SD</th>
<th>PA MEANS</th>
<th>PA SD</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>MALES</td>
<td>19.65</td>
<td>12.0529</td>
<td>6.81</td>
<td>5.6018</td>
<td>38.03</td>
<td>8.1041</td>
<td>95</td>
</tr>
<tr>
<td>FEMALES</td>
<td>25.20</td>
<td>13.1869</td>
<td>6.59</td>
<td>5.2889</td>
<td>35.75</td>
<td>8.4899</td>
<td>120</td>
</tr>
</tbody>
</table>

SD = Standard Deviation  
$N = 215$  
Missing cases = 2

Table 15

Relationship of Gender and MBI scores of this study
Table 16.

MBI norms for gender (Maslach and Jackson, 1986)

Significant difference between the norms for each of the three subscales for gender (Maslach and Jackson, 1986) and the scores of the three subscales for gender of this sample were calculated by using a Z-test at the level of significance indicated below. The results are as follows:

* A significant difference was found between the females for emotional exhaustion (Z = 3.458), the score for the sample of the current study being higher. p < 0.01.

* A significant difference was found between the males for personal accomplishment subscale (Z = 2.063), the score for the sample of the current study being higher. p < 0.05

* No significant difference was found for males for the subscale, emotional exhaustion (Z = 0.167, p > 0.05) and for the depersonalisation subscale (Z = 1.053, p > 0.05).

* No significant difference was found for females for the subscale, depersonalisation (Z = 0.869, p > 0.05) and for the subscale personal accomplishment (Z = 0.958, p > 0.05).

Research Question 6.3

6.3 To determine whether significant differences are found for each of the three subscales of the MBI (Maslach and Jackson, 1986) between males and females in this sample.
Using the analysis of variance, the scores for EE for females (F = .004) are significantly higher indicating greater emotional exhaustion. DP indicated no significant difference between males and females. While for PA males scored significantly higher than females. This implies that males in this study have a greater sense of personal accomplishment than females.

Research Question Seven
7. To determine if any significant differences are found for each of the three subscales of the MBI (Maslach and Jackson, 1986) among the age categories of this sample.

<table>
<thead>
<tr>
<th>AGE</th>
<th>EE MEANS</th>
<th>EE SD</th>
<th>DP MEANS</th>
<th>DP SD</th>
<th>PA MEANS</th>
<th>PA SD</th>
</tr>
</thead>
<tbody>
<tr>
<td>20 - 30 YEARS</td>
<td>23.00</td>
<td>12.1161</td>
<td>6.72</td>
<td>4.7009</td>
<td>37.54</td>
<td>6.5412</td>
</tr>
<tr>
<td>31- 40 YEARS</td>
<td>22.60</td>
<td>12.9300</td>
<td>6.69</td>
<td>5.5638</td>
<td>35.49</td>
<td>8.2772</td>
</tr>
<tr>
<td>OVER 41 YEARS</td>
<td>23.50</td>
<td>13.7555</td>
<td>5.87</td>
<td>6.0388</td>
<td>38.46</td>
<td>9.1389</td>
</tr>
</tbody>
</table>

SD = Standard deviation

Table 17
Relationship of age and MBI scores

Analysis of variance was used to examine the data for significant differences among the three age categories for each of the three subscales of MBI (Maslach and Jackson, 1986) (Table 17). No significant differences were found.

Research Question Eight
8. To determine whether significant differences are found for each of the three subscales of the MBI between those at post level one and those above post level one.
The MBI scores for each of the three subscales for the two post level categories are tabled below (Table 18). Analysis of variance revealed no significant differences for each of the three subscales of the MBI, between those at post level one and those above post level one.

<table>
<thead>
<tr>
<th></th>
<th>POST LEVEL ONE</th>
<th>POST LEVEL TWO AND ABOVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emotional exhaustion</td>
<td>23.87</td>
<td>22.81</td>
</tr>
<tr>
<td>Emotiona exhaustion</td>
<td>6.67</td>
<td>6.68</td>
</tr>
<tr>
<td>Personal accompaniment</td>
<td>37.40</td>
<td>36.64</td>
</tr>
</tbody>
</table>

Table 18.
Relationship of Post-level and MBI scores.

4.5 PRESENTATION OF RESULTS OF THE REDUNDANCY AND REORGANISATION ISSUES.

This section is divided into two parts, First the responses of the structured questions on Redundancy and reorganisation issues will be presented. This is followed by a summary of the responses to the open-ended question.

4.5.1 Redundancy and reorganisation issues - results of structured questions.

A summary of the responses to the statements on Redundancy and Reorganisation issues follows. Table 19 lists the statements to which the respondents were asked to respond. It is followed by Table 20 which summarises their responses.
<table>
<thead>
<tr>
<th>NUMBER</th>
<th>QUESTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>I am concerned about the issues around redundancy and right sizing of schools</td>
</tr>
<tr>
<td>2.</td>
<td>Concern about redundancy and right sizing have made me feel more stressed than usual.</td>
</tr>
<tr>
<td>3.</td>
<td>All this talk about redundancy has not affected my health.</td>
</tr>
<tr>
<td>4.</td>
<td>I was just as effective as a teacher before the issue of redundancy was raised.</td>
</tr>
<tr>
<td>5.</td>
<td>If my financial security is assured, in terms of a package, I would not mind leaving my job.</td>
</tr>
<tr>
<td>6.</td>
<td>I am reluctant to give up teaching at this stage.</td>
</tr>
<tr>
<td>7.</td>
<td>If necessary I will be willing to move to another part of the province in order to continue teaching.</td>
</tr>
<tr>
<td>8.</td>
<td>I am reluctant to leave the area in which I am teaching.</td>
</tr>
</tbody>
</table>

Table 19.

The questions on Redundancy and Reorganisation Issues.

<table>
<thead>
<tr>
<th>RESPONSE</th>
<th>STRONGLY AGREE</th>
<th>AGREE</th>
<th>UNCERTAIN</th>
<th>DISAGREE</th>
<th>STRONGLY DISAGREE</th>
</tr>
</thead>
<tbody>
<tr>
<td>QUESTION 1.</td>
<td>42.1%</td>
<td>24.5%</td>
<td>14.8%</td>
<td>9.7%</td>
<td>8.8%</td>
</tr>
<tr>
<td>QUESTION 2.</td>
<td>30.7%</td>
<td>34%</td>
<td>19.1%</td>
<td>14%</td>
<td>2.3%</td>
</tr>
<tr>
<td>QUESTION 3.</td>
<td>12.5%</td>
<td>31%</td>
<td>21.3%</td>
<td>22.2%</td>
<td>13%</td>
</tr>
<tr>
<td>QUESTION 4.</td>
<td>31%</td>
<td>36.1%</td>
<td>10.6%</td>
<td>14.8%</td>
<td>7.4%</td>
</tr>
<tr>
<td>QUESTION 5.</td>
<td>27.9%</td>
<td>27.4%</td>
<td>16.3%</td>
<td>18.6%</td>
<td>9.8%</td>
</tr>
<tr>
<td>QUESTION 6.</td>
<td>22.2%</td>
<td>33.3%</td>
<td>20.4%</td>
<td>15.7%</td>
<td>8.3%</td>
</tr>
<tr>
<td>QUESTION 7.</td>
<td>7.4%</td>
<td>10.6%</td>
<td>17.6%</td>
<td>24.1%</td>
<td>40.3%</td>
</tr>
<tr>
<td>QUESTION 8.</td>
<td>36.3%</td>
<td>31.6%</td>
<td>11.6%</td>
<td>10.2%</td>
<td>10.2%</td>
</tr>
</tbody>
</table>

Table 20.

Tabulation of results of Redundancy and Reorganisation Issues.
4.5.1.1 Age and Redundancy issues.

The Kruskal-Wallis 1-way Anova (non-parametric) was used to analyse the data for age by redundancy. Once again question five had significant differences (chi-square = 8.9309 with \( p < .008 \)), thus showing that older teachers (41 years and older) were strongly in agreement with the question, "If my financial security is assured, in terms of a package, I would not mind leaving my job."

4.5.1.2 Gender and Redundancy issues.

There were no significant results with regard to gender and redundancy issues. Mann-Whitney U tests were used.

4.5.1.3 Post-Level and Redundancy issues.

Responses to these items were analysed using the Mann-Whitney U tests. The following three questions reflected significant results, for educators who were at post level two and above (\( P < 0.05 \) for all three questions).

5. "If my financial security is assured, in terms of a package, I would not mind leaving my job." Significantly more post-level one (teachers) respondents strongly disagreed with this statement. (\( U = 1448.5 \))

6. "I am reluctant to give up teaching at this stage." Significantly more post-level two respondents strongly disagreed with this statement, i.e. they were happy to leave teaching at this stage. (\( U = 1216.5 \))

8. "I am reluctant to leave the area in which I am teaching." Significantly more post level two respondents strongly disagreed with this statement, i.e. they were happy to leave the area in which they were teaching. (\( U = 1470.5 \))

4.6 RESPONSES TO THE OPEN-ENDED QUESTION.

The last question in the questionnaire was an open ended question. The aim was to capture important information that could have been omitted or missed in the structured statements and the psychometric measures. The responses were analysed for content and allocated into seven categories, Table 21.
<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>RESPONSES</th>
<th>FREQUENCY</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Stressed, fearful, frustrated, uncertain, worried and emotionally disturbed. My stress levels are high and it has affected my personal/family life. I often feel irritated and worried at home.</td>
<td>37</td>
</tr>
<tr>
<td>B</td>
<td>Teaching is no longer a profession, it has lost its status, it is an unworthy profession, it is not worth the number of years you studied. The uncertainty and increased stress level has affected my professional duties. Not as effective as a teacher, not giving of my best in the class room.</td>
<td>16</td>
</tr>
<tr>
<td>C</td>
<td>God has his plans, Larger forces are at work, I am more focussed and serious about teaching now. I am not entirely happy with the 'package', This is a good time to move up the post level structures/promotions opportunity has increased. Concern about teaching second language users.</td>
<td>10</td>
</tr>
<tr>
<td>D</td>
<td>Change is good, things will work out, the redeployment is essential in South Africa, I am optimistic that the changes would not be that bad.</td>
<td>10</td>
</tr>
<tr>
<td>E</td>
<td>Not unduly concerned about the current issues. It has not affected my professional duties. All the uncertainty has not affected me.</td>
<td>9</td>
</tr>
<tr>
<td>F</td>
<td>I am frustrated with teaching and I am looking at other career options. I have applied for other jobs.</td>
<td>8</td>
</tr>
<tr>
<td>G</td>
<td>The high stress levels have had a direct effect on my health.</td>
<td>5</td>
</tr>
</tbody>
</table>

n = 92

Table 21.
Categorisation of responses to the open-ended question.
Category “A” which reflects high stress levels among teachers had the highest frequency. The second highest frequency reflected the teachers’ disappointment with the profession and its drop in status. A number of teachers attempted to come to terms with the changes by offering explanations, e.g “God has his plans” and “There are larger forces at work.” or “I am not really uncertain about my career. I believe strongly that we are in a transitional phase and certain changes have to be made to create equity and advantage the disadvantaged people, more especially the African pupils.”

4.7 SUMMARY OF RESULTS

In summary poor mental health status was recorded for this sample as measured by the GHQ. This sample can be described as “severely distressed”. Also mental health scores for both genders were significantly higher than the standardised norm (Goldberg, 1976). No significance for mental health status was found between the three age categories of this sample. Also no significance existed between the genders of this sample. When it came to post-levels, no significance was found between the post levels for mental health status.

Regarding the results of the MBI, there was a significantly higher score (than the norms, Maslach and Jackson, 1986) for personal accomplishment thus indicating a low-level of burnout. A significantly higher score (than the norms, Maslach and Jackson, 1986) on the subscale emotional exhaustion was also indicated. While the scores for depersonalisation from the current sample were significantly lower than the norms (Maslach and Jackson, 1986). Significant correlations existed between emotional exhaustion and depersonalisation, as well as between depersonalisation and personal accomplishment.

When it came to gender and MBI scores, the scores for females of this sample, on the subscale emotional exhaustion was significantly higher than the norms (Maslach and Jackson, 1986). The subscales depersonalisation and personal accomplishment
revealed no significant difference for females.

Lastly, on the subscale personal accomplishment males scores significantly higher than the norms (Maslach and Jackson, 1986). No significant relationship existed for males on the subscales emotional exhaustion and depersonalisation.

When comparing scores of the MBI within the current sample, females scored significantly higher on emotional exhaustion and males scored higher on personal accomplishment. Interestingly no significant differences were found between the various age categories and MBI scores. Also no significance was found between post-levels and MBI scores.

Redundancy and reorganisation issues, indicated concern around the current changes in education together with increased stress level. A large number of teachers indicated that the current stress has impacted on their health. 27.9% strongly agreed and 27.4 % agreed that they were willing to leave the profession if their financial security was assured. Also 40.3% of the teachers were not willing to move to other parts of the province. When it came to the open-ended question, the majority of the teachers indicated increased levels of stress, frustration, irritation, fearfulness and emotional disturbance.

These results will be discussed in detail in the following chapter.
CHAPTER FIVE

DISCUSSION

5.1 INTRODUCTION
The purpose of this study, as pointed out in Chapter Three, was to determine teachers' stress levels, incidence of burnout and their mental health status during a period of major transformation. These issues are examined in terms of teacher age, gender and post level. A further aim was to determine teachers' perceptions of the current changes and reorganisation in education. This chapter will discuss the findings of this investigation and make comparisons with the findings of other researchers in the above light.

It is important to note that any random sample of teachers, is a sample of those teachers who have remained in the profession. Others, for numerous reasons, one of which may be stress, have left the profession (Rutsch, 1997). Furthermore by the time that the information for this study was gathered, many teachers had already taken the decision to volunteer for a severance package. Many of the older teachers who were in post-level two and above were happier to take early retirement in the form of severance packages, rather than staying and experiencing the changes. A probable reason could be the stress related to the enormous and rapid changes. This study did not differentiate these teachers from those who have remained in the profession. The vast number of teachers who left having taken the voluntary severance package, provided many opportunities for promotion posts and acting positions. These opportunities for promotion also absorbed some of the impact of the stress around change. It left some teachers motivated and rejuvenated, while others were left disappointed. The data collected should be interpreted in the above context. The results will be discussed under the following sub-headings:

5.2 Mental health status of teachers.
5.3 Teacher stress and burnout.
5.4 Redundancy and Reorganisation issues.
5.5 Summary.
5.2. MENTAL HEALTH STATUS OF TEACHERS.

The responses of these teachers to the General Health Questionnaire indicated high distress levels and poor mental health status. The mean GHQ score indicated a 'severely distressed' sample (Goldberg, 1976). The extremely high mean score can probably be explained in the context of the current changes in education and the resistance to it (2.2.2). The GHQ is designed to measure the appearance of new phenomena of a distressing nature (3.2). To isolate the changes as a single factor that leads to poor mental health maybe simplistic. Change can be seen as a compounding factor to all the other stressors that are inherent in teaching (2.5). This is also evident in the results of the Question 1, of the Redundancy and Reorganisation Issues, where 42.1% of the teachers strongly agreed and a further 24.5% of the teachers agreed that they are concerned about the redundancy and Right Sizing in schools. Also a further 30.7% of the teachers strongly agreed and 34% of the teachers expressed increased stress levels directly related to the current changes (Question Two of the Redundancy and reorganisation issues). This is also evident in the high scores for Emotional Exhaustion in the MBI (5.3.1.1).

In response to Question 3, on Redundancy and Reorganisation Issues, 13% strongly agreed, 22.2% agreed and 21.3% were uncertain on the issue: "All this talk about redundancy has not affected my health." This suggests that teachers may have underestimated the effects of redundancy issues on their health, given the high levels of distress as indicated by the GHQ scores.

It is important to note that GHQ standardised scores for teachers are unavailable and therefore comparison had to be made with scores from other samples. Four other South African studies have used GHQ, namely, Leeb (1986), O’Neil (1988), Pillay et al. (1992) and John (1996). John (1996), in his study of a South African sample of bilingual (English-Zulu) speaking students, the mean GHQ score was 9.28. O’Neil (1988) obtained the mean GHQ score of 10.00 (SD = 5.16) with a sample of South African shop stewards. The Leeb (1986) study does not report a mean GHQ score.
But 71.7% of her sample (n = 113) of employed and unemployed adults, scores between 1 and 10. Pillay, et al. (1972) did not report mean GHQ scores but state that as many as 94.4% of their sample of primary caregivers from a conflict-ridden area, scored above 4. In all of these cases the mean scores are above the cut-off score of 4. This indicates high distress levels and poor mental health status, according to the developer of the instrument (Goldberg, 1976).

Other related studies have indicated similar results. Moodley (1995) discusses the increasing number of teachers applying for medical boarding (Table 2) over the years thus indicating a steady decline in the general health of teachers, both physical and psychological. This is consistent with the high GHQ score of this study. Moodley’s results are discussed in Chapter Two (2.9.1) and are similar to the results of this study. Kasl et al (1975) found that the anticipation period (of unemployment) might be most stressful. It was during this period that physical and psychological symptoms were most significant. This is useful to know, since the teachers in this sample are also in anticipation of change. Thus their physical and psychological states might be similarly affected, as shown by high GHQ scores. Jenkins et al (1982) examined the effects of the threat of redundancy on the mental health of a group of professionals. They found a reduction in minor symptomatology after the withdrawal of redundancy notices (2.8). These studies consistently show that change in an organisation has a negative impact on an individual’s mental health status.

5.2.1 The relationship between demographic variables and Mental Health Status

5.2.1.1 Age and Mental Health Status

The findings of this study revealed no significant difference in GHQ scores among the three age categories. This finding is consistent with the findings of Banks et al (1980). The mean score for the age group over 41 years was slightly higher than that of the other two age groups. This trend is consistent with Hepworth’s (1980) study, where the age group 35-44 had the highest mean score, suggesting poor mental health.
The trend towards higher scores for the older age group may suggest that older teachers will resist the changes because they are set in their old styles. It may be the case that there was covert pressure by the department for the older teachers to either retire or apply for the severance package. Subsequently, severance packages were granted mainly to the older teachers. The psychological pressure and stress around making such decisions could be reflected in the GHQ scores of this age group.

5.2.1.2 Gender and Mental health Status

The scores for both males and females in this study were significantly higher than the standardised norms for the GHQ (Goldberg, 1976). The scores for males and females within this sample did not differ significantly. This implies that the changes affect everyone in an organisation, irrespective of gender.

This finding is consistent with those of Cox et al (1983) and Banks and Jackson (1982). Their data suggested that there are no fundamental gender differences in the experience and reporting of symptoms of ill-health. Cooper and Kelly's (1993) study revealed gender differences. Female teachers seem to be more resilient and better 'copers' than their male counterparts, who show significantly poorer mental health in all sectors of the educational system (Cooper and Kelly, 1993).

5.2.1.3. Post-level and Mental Health Status

No significant differences were found between the GHQ scores for the two Post level categories. This is consistent with the findings of Banks et al (1980), who found no significant differences in the health status of workers at different job levels and ages.

5.3 TEACHER STRESS AND BURNOUT.

Means and standard deviations related to the three dimensions of burnout, Emotional
Exhaustion, Depersonalisation and Personal Accomplishment, in this study were compared to the sample in Maslach and Jackson’s (1986) study. The overall scores for the present study indicated a lower degree of burnout than the norms (Maslach and Jackson, 1986). This sample indicated higher scores for Emotional Exhaustion and Personal Accomplishment. Depersonalisation scores were lower. This result is interesting since one would have expected a higher incidence of burnout among these respondents considering their current circumstances. However the higher score in Emotional Exhaustion may more accurately reflect the teacher’s feelings of being exhausted by their work. Further discussion on the results of each of the three subscales follows.

5.3.1.1 Emotional exhaustion

The scores for Emotional Exhaustion of the respondents from this study are significantly higher than the norms (Maslach and Jackson, 1986). The nine items in this subscale describe feelings of being emotionally overextended and exhausted by one’s work. A high score corresponds to higher degrees of experienced burnout.

These results concur with the findings of Rutsch (1997). Where the mean score for Emotional Exhaustion is higher than the norms (Maslach and Jackson, 1986). This implies that the respondents from both these studies were emotionally exhausted. This is an interesting finding since both the studies were conducted during the same year (1997) and revealed similar findings despite the fact that different populations were used. This suggests that the changes in education were impacting on the stress levels of the wider teacher body. Moodley’s (1995) study revealed scores for Emotional Exhaustion that were also closer to the norms, at a time just before the reorganisation began.

If one has to closely examine the questions that constitute this subscale, one would discover that they are closely related to stress and exhaustion around the job (Table 22). However, the impact of the change in education can be seen in
the responses on Redundancy and Reorganisation Issues. In Question two, 30.7% of the respondents strongly agreed and 34% agreed with the statement, that they are concerned with the issues of change. Thus a large percentage of the respondents are feeling particularly stressed around the reorganisation that is currently occurring. It appears from the findings for Emotional Exhaustion that the stress may be also related to their role as teachers. Interestingly in their response to Question four of the Redundancy and Reorganisation issues, 7.4% strongly disagreed and 14.8% disagreed with the statement concerning their effectiveness as a teacher before the changes. The majority of these teachers indicated that their effectiveness in the classroom is not compromised by the stress related to the changes.

| I feel emotionally drained from my work. |
| I feel used up at the end of the work day. |
| I feel fatigued when I get up in the morning and have to face another day on the job. |
| Working with people all day is really a strain for me. |
| I feel burned out from my work. |
| I feel frustrated by my job. |
| I feel I'm working too hard on my job. |
| Working with people directly puts too much stress on me. |
| I feel like I'm at the end of my tether. |

Table 22

MBI question on Emotional Exhaustion

(Maslach and Jackson, 1986)

5.3.1.2 Depersonalisation

The scores for Depersonalisation of the respondents from this study are significantly lower than the norms from the standardisation study (Maslach and Jackson, 1986) as a high score corresponds to higher degrees of experienced burnout. This indicates that
the stress and burnout levels of this sample are not high. Depersonalisation measures the extent to which teachers have a negative or cynical attitude towards the students. (Table 23, for questions on depersonalisation). Callous or even dehumanised perceptions of students can lead the teachers into believing that the students are somehow deserving of their troubles (Maslach and Jackson, 1986). The teachers in this sample do not exhibit negative or cynical attitudes and feeling towards their

| I feel I treat some students as if they were impersonal objects. |
| I’ve become more callous towards people since I took this job. |
| I worry that this job is hardening me emotionally. |
| I don’t really care what happens to some students. |
| I feel students blame me for some of their problems. |

Table 23

MBI questions on Depersonalisation
(Maslach and Jackson, 1986)

students. This concurs with the results found by Moodley (1995). The score for Depersonalisation complements the results for the subscale on Personal Accomplishment and suggests that these teachers have good relationships with their students. The low score for Depersonalisation indicates that the teachers view their pupils in a positive light. Thus the main concerns (stress and burnout) of the teachers are not around their relationship with their students. Their high distress levels (as indicated by the scores from the GHQ) have another source, probably the current changes in education.

5.3.1.3 Personal Accomplishment

The scores for **Personal Accomplishment** of the respondents from this study are significantly higher than the norms from the standardisation study (Maslach and Jackson, 1986). This implies a higher sense of personal accomplishment and a lower
level of burnout. This is a crucial aspect for teachers since it examines their relationship with the pupils and their ability to help them. A teacher’s sense of accomplishment in these respects is very important since there are few other areas in which teachers can look forward to, for reward. The questions for Personal Accomplishment are listed in Table 24. They relate specifically to the performance of the teacher in the classroom, rather than to the broader professional role.

| I can easily understand how my students feel about things. |
| I deal very effectively with the problems of my students. |
| I feel I’m positively influencing other people’s lives through my work. |
| I feel very energetic. |
| I can easily create a relaxed atmosphere with my students. |
| I feel exhilarated after working closely with my students. |
| In my work I deal with emotional problems very calmly |

Table 24

MBI questions for Personal Accomplishment
(Masiach and Jackson, 1986)

The scores for Personal Accomplishment in this study are higher than those reported by Rutsch (1997) (Table 25) for teachers from both private and government schools. The current study included teachers from public schools only.

<table>
<thead>
<tr>
<th></th>
<th>EE</th>
<th>DP</th>
<th>PA</th>
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<tbody>
<tr>
<td>Current study</td>
<td>23.13</td>
<td>6.82</td>
<td>36.44</td>
</tr>
<tr>
<td>Rutsch’s study</td>
<td>27.46</td>
<td>8.31</td>
<td>33.48</td>
</tr>
<tr>
<td>Moodley’s study</td>
<td>22.88</td>
<td>4.58</td>
<td>35.90</td>
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</tbody>
</table>

Table 25

Comparative scores of three studies.

However the mean score of this sample for Personal Accomplishment is close to that 73.
found by Moodley (1995) (Table 25). Both scores are higher than the norms presented by Maslach and Jackson (1986). Moodley’s sample and the sample of the current study were predominantly Indian teachers in schools formerly administered by the House of Delegates.

5.3.1.4 Distribution of respondents: degree of burnout

Maslach and Jackson (1986) conceptualise burnout as a continuous variable, ranging from low to moderate to high degrees of experienced feeling. It is not viewed as a dichotomous variable, which is either present or absent. Maslach and Jackson’s (1986) numerical cut-off points and categorisation of scores are reflected in Table 4. To further explore the burnout phenomenon in this sample of teachers the author examined the distribution of respondents in the three categories of burnout (i.e. high, average and low) on each subscale.

<table>
<thead>
<tr>
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<th>EE</th>
<th>DP</th>
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</thead>
<tbody>
<tr>
<td>LOW</td>
<td>38.3%</td>
<td>62.8%</td>
<td>49.5%</td>
</tr>
<tr>
<td>MODERATE</td>
<td>20.9%</td>
<td>24.5%</td>
<td>24%</td>
</tr>
<tr>
<td>HIGH</td>
<td>40.8%</td>
<td>12.8%</td>
<td>26.5%</td>
</tr>
<tr>
<td>n = 196</td>
<td>n = 196</td>
<td>n = 196</td>
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Table 26

Distribution of scores of MBI subscales in percentage.

A closer examination of the results (Table 26) revealed that for Emotional Exhaustion, in which a high score reflects burnout, 40.8% of the respondents score high. Emotional Exhaustion alone does not reflect burnout. It has to be examined together with a high score in depersonalization. In this case 12.8% of the sample responded with a high in the category. A low score in Personal Accomplishment also indicates a high degree of burnout, 49.5% of the respondents scored a low in this category. Thus the overall picture shows a high degree of stress and burnout which can be attributed to the general pressures associated with teaching (2.5) and to the current changes in
education (1.2).

5.3.2. The relationship between demographic variables and stress and burnout.

5.3.2.1 Age and MBI scores

This study showed no significant differences among the various age categories for MBI scores. This was consistent with Moodley (1995), who found no significant difference among his four age groups in their experience of burnout.

5.3.2.2 Gender and MBI scores

The scores for Emotional Exhaustion for females are significantly higher than those of males. Females of this sample had a higher score for Emotional Exhaustion than the norms (Maslach and Jackson, 1986). This finding is consistent with Maslach and Jackson (1981 b), where females experienced more emotional exhaustion than males. Maslach (1982 a) suggests that as women are generally more emotional than men, they may become more emotionally involved in their jobs and hence experience more emotional exhaustion. Kyriacou and Sutcliffe (1978) (2.3.4) found female teachers found pupil misbehaviour a greater source of stress, while males found administrative (paper work) more stressful.

When it came to the subscale for Personal Accomplishment, males scored significantly higher than females (38.03 = males females = 35.75) within this sample. This can be possibly explained in the well documented fact that more males are promoted in teaching than their female counterpart. Statistics on upper management clearly indicates this. The current changes provide opportunities for promotion and “acting” posts, which may have contributed to the high score for Personal Accomplishment for males.

No significant difference for Depersonalisation was found between genders in this
study. This is not consistent with research by Maslach and Jackson (1986). They found that males teachers tend to score higher than female teachers on the Depersonalisation scale. They suggest that a possible explanation for the difference could be sex role socialization that results in the different career expectations of men and women. The fact that no significant difference could be found in this study could be explained in terms of the changing role of both males and females in society and that females are taking their jobs more seriously and greater promotion opportunity exists now for females, especially in South Africa as a result of its affirmative action policies. According to this policy females must be given equal opportunity for jobs and promotion to correct the previous disparities (Gender issues is one of the three aims of the Affirmative Action in South Africa).

Moodley (1995) found no significant differences MBI subscale scores, between the sexes in his study.

5.3.2.3 Post level and MBI scores

No significant differences were found between post-level and MBI scores for this study. Again this was consistent with Moodley (1995), who found no significant difference in his study between the various post levels.

Cooper and Kelly (1993) assessed occupational stress. They found that head teachers' levels of job dissatisfaction and mental ill health was higher than those of their female counterparts. Female head teachers suffered significantly greater job dissatisfaction than their male counterparts. Trump(1987) found that school principals regarded implementing new teaching programmes as stressful because of teacher resistance to changes.
5.4 REDUNDANCY AND REORGANISATION ISSUES.

5.4.1 Responses to the structured statements.

The teachers' responses to the statements on Redundancy and Reorganisation Issues reflects the current uncertainty in education. The teachers were divided in their attitude towards remaining in the profession. In response to Question 5 on the possibility of taking a severance package, 27.9% strongly agreed and 27.4% agreed (combined score of 55.3%) that they are willing to leave teaching. The financially lucrative incentive offered by the education department may have influenced this response. The other option could be that the teachers are disappointed with education and the profession, and would therefore prefer to leave. Many of the teachers who opted for the severance package are young and not ready for retirement. The impact of a large number of trained and experienced teachers leaving at the same time has created a void that is difficult to fill. The schools are left with teachers who are already stressed having to cope with these vacant posts. In many schools, classes had to be compressed and teacher workload increased in order to cope in the wake of the granting of severance packages. Despite the current uncertainties many teachers were committed to the profession and willing to remain in it. As many as 55.5% (combined “strongly agree” and “agree” score) of the teachers indicated that they are reluctant to give up teaching at this stage. There are two possible explanations for this finding. One is that they are committed to teaching and enjoy it. The other is that they need the job, since other jobs are scarce in the current economic climate with rising unemployment figures. If this question is examined in the light of Question 5, where 55.3% of teachers were willing to leave teaching if their financial security is assured, then probably many teachers are remaining in teaching only for their financial security.

One option that the department of education has considered is the redeployment of teachers to schools where their services are needed. Question 7 and 8 examined whether teachers are happy to leave their current school and area. A move like this would imply teaching in a new socio-economic-cultural environment. Moving to teach...
in other areas could mean being exposed to higher crime rates. One teacher commented that going to teach in black schools is unsafe as even the black teachers don’t feel safe in their own schools. Ironically it could also mean a promotion, since many of the lucrative higher level posts are vacant in the predominantly Black rural areas where the services of trained teachers are required. The reactions to this question reflect the above dilemma. Where 18% of the teachers were willing to leave their current school and teach elsewhere even in another provinces, 67.9% of teachers were not happy to leave the current area in which they are teaching.

5.4.1.1 Age, gender and Post-level differences in response to Redundancy and Reorganisation issues.

The responses of questions 1 - 8 were analysed for differences in age, gender and post level (4.5.1.1, 4.5.1.2 and 4.5.1.3). No significant gender differences were found, implying that teachers of both genders hold similar perceptions on the issues raised.

Older teachers and teachers who were in post-level two and above (in most cases these constituted the older teachers) were happier to leave teaching by taking severance packages. This was expected as the state was encouraging this trend. The intention of the state was to phase in equity in the funding of education between the provinces. The issue of severance packages has already been discussed in 5.4.1

Interestingly teachers at post-level two and above were happy to leave the current area. This might have to do with the promotion opportunities that exist in the other areas. These teachers presumably are experts in their fields and being more qualified and experienced, have a better chance of being promoted. Other teachers felt it was “unfair to be shuffled around as it (the department of education) deems fit.”

5.4.2 Teachers’ comments on Redundancy and Reorganisation issues.

For the purposes of analysis, teachers’ responses to the open-ended question were
categorised in seven categories (Table 21).

**Category “A”** included comments indicating high stress levels, fearfulness, uncertainty, being worried, emotionally disturbed and irritated. The highest number of comments fell into this category. Dunham (1992) associated stress with deteriorating health (2.3.1). The consequences of this are manifested in the personal and family life. The consequences of high stress levels can be seen in the context of Sutherland and Coopers’ model (1990) (2.3.2.1) and Figures 2, 3 and 4. Many comments attributed the increase in stress to the current changes. Marshall and Cooper (1981) (2.6) found that regardless of organisational type, change in events or episodes on the job are most stressful. One teacher commented, “I feel demotivated. Your efforts with the pupils do not count. Other factors beyond your control determine your future.” Another teacher commented on the stress and tension among the teachers, “There is tension among staff as to who should be made redundant.” In many schools this issue is one that is highly controversial. Teacher in-fighting is centred around the criteria for redundancy. Principals saw this as opportunity to get rid of “lazy teachers”.

**Category “B”** brought to light teachers’ disappointment with teaching and its declining status. The second largest number of comments fell into this category. Teachers generally commented on their disappointment with the profession. Many felt that teaching is not worth it; it has lost its status; it is no longer a professional job. Many commented on the impact of the increased stress levels on their professional duties. Some of the comments that were made reflect the teachers’ disappointment. “Made me realise that teaching is no longer a worthy job,” “this is what our career has been lowered to” and “I am totally disappointed with my career. I have spent a great deal of money to obtain my teacher qualifications and now I am disillusioned.” This category also includes comments by teachers who felt that their effectiveness as teachers had been compromised by the current situation in education. Thus the brunt of organisational change is felt in the classroom. Teachers are aware of this and try very hard to leave their frustrations outside the classroom, as indicated by the MBI scores in this study.

79.
Category “C” involved a philosophical rationalisation of the situation, acceptance of it, seeing change in a positive light, and general optimism about teaching. Others viewed the problem in spiritual and religious terms. Comments made were as follows: “redeployment will benefit the disadvantaged people in South Africa”, “the current uncertainty means future advancement,” and “this is part of God’s greater plan.”

Category “D” showed that teachers saw the change as necessary and viewed the stress as a challenge. They also expressed their satisfaction with teaching. This view is supported by Kyriacou and Sutcliffe (1979), who found that a significant number of teachers were either very satisfied or fairly satisfied with teaching. Also many writers have agreed that a certain amount of stress is useful (2.3.1). “I am not in any way deterred, I am not under any threat or fear. I have accepted the challenges of changing South Africa”, was the comment of one teacher.

Category “E” comprised of comments that indicated that teachers were not unduly concerned about the current education situation. The current situation has “has not bothered me”. This detached attitude could be a coping mechanism to ward off the anxiety. Also various defence mechanisms can be evoked, such as rationalisation, denial, selective inattention, withdrawal, and passivity. In this study some of the comments suggested a denial of the current stressors in education. This could suggest depression in the individuals, given the high GHQ scores.

Category “F” consisted of comments by the teachers expressing their intention of leaving teaching and looking for alternate careers. The relationship between self-reported stress and an intention to leave an occupation was researched by Kyriacou and Sutcliffe, 1979. They reported that 23.5% of their respondents had intentions of leaving teaching (2.5). The percentage in this sample is 8.6%. This figure might have been considerably higher without the option of the severance package. But in this sample teachers had taken positive attempts to leave the profession, by applying for other jobs. Some attributed their intention to leave directly to the uncertainty in education. “The uncertainty has forced me to reassess my career and the direction in
which my life is heading."

Category “G” showed some teachers reporting that the high stress levels had directly affected their health. This is a well known and researched consequence of stress and burnout (2.6). Cedoline (1982), in discussing the consequences of stress and burnout, said that stress impacts on an individual’s physical well-being. A teacher in the present study reported ulcers due to the pressures in school.

5.5. SUMMARY

The overall picture that emerges shows high distress levels and poor mental health status.

Initially, there was an apparent contradiction between the scores of the MBI and GHQ. Closer examination revealed the content of the MBI focuses on the teachers’ professional role and not on organisational issues. The scores revealed lower levels of stress and burnout than the norms (Maslach and Jackson, 1986). This was reconciled when the distribution of MBI scores were examined. The MBI scores now complemented the high scores in the GHQ which indicates poor mental health status.

Teachers of this sample scored high in Personal Accomplishment. This shows a greater sense of personal accomplishment, which may be associated with the current promotion opportunities. The Depersonalisation scores were low, indicating that the teachers of this sample have a positive and supportive attitude towards their pupils. The score of this study for Emotional Exhaustion was significantly higher than the norms (Maslach and Jackson, 1986), indicating increased feelings of emotional exhaustion as emotional resources are depleted. The difference for MBI scores between the genders of this sample showed that females were more emotionally exhausted than the males, while males scored higher on the Personal Accomplishment subscale.
Analysis of the Redundancy and Reorganisation issues provided information to contextualise the study. The results clearly indicated that the teachers were anxious and stressed about the current changes in education. A large number of teachers reported that this has had a negative impact on their health and personal lives. Their source of stress appeared to be related to the uncertainty and changes in education and not as a result of their professional duties. Some teachers were considering leaving the profession. A large number of the older teachers were willing to leave the profession if their financial security was taken care of. Many teachers' indicated their anxiety about leaving their current demographic area of teaching. This would imply teaching in a different socio-economic-cultural area. However, a substantial number of teachers viewed the current situation in education as an opportunity for promotion and were willing to move to other provinces to teach. A large number of teachers still found teaching a rewarding and challenging job and were able to cope with the uncertainty in education.
CHAPTER SIX

CONCLUSION

6.1 INTRODUCTION

This study set out to examine teachers’ mental health status and stress levels in Kwa Zulu-Natal, at a time of reorganisation and change within the education department. The findings indicate that the distress levels were extremely high for all respondents, irrespective of age, gender and post level. Such individuals would be considered to be in need of professional help and support. This form of support is lacking within the education structures and requires urgent attention and implementation.

Teachers of this sample initially appeared not to be highly stressed and their levels of burnout were lower than the norms (Maslach and Jackson, 1986). This contradicted the high distress levels as shown by the General Health Questionnaire (GHQ). Closer scrutiny of the Maslach Burnout Inventory (MB) revealed two important facts. Firstly the MBI measures stress and burnout specifically relating to a teacher’s professional role. It does not measure the impact of the wider organisational issues on the teacher. Secondly, an examination of the distribution of MBI scores revealed that for the subscale Emotional Exhaustion the scores from this study were significantly higher than the norms (Maslach and Jackson, 1986). An examination of the MBI scores with the above in mind showed that the scores of the GHQ and MBI complement each other. The high GHQ score and responses to the questions on Redundancy and Reorganisation issues indicate that teachers are affected by the rapid changes.

This study suggests that the high distress levels are not associated with the teacher’s role function but are more likely to be the consequence of the changes within the education department.

The impact of the current changes on teachers’ psychological and physical well-being
was reflected by their responses to questions in the Redundancy and Reorganisation section of the questionnaire. A large number of teachers indicated that uncertainty and rapid changes had impacted directly on them both psychologically and physically. Some teachers felt comfortable with the changes which they saw as necessary. Others saw promotion opportunities in the current situation and were prepared to move and teach in other parts of the country. Some older teachers indicated their desire to leave teaching, with severance packages that assured their financial security.

Attributing a single cause to stress, burnout or poor mental health would be simplistic. Poor psychological well-being is a result of a number of compounding factors. The interpretation of the results involved a great deal of speculation and, in many cases, generated more questions than answers.

Ellis (1998) summarised the current situation quite succinctly, “In the three and a half years since he took charge, Minister Sibusiso Bengu has created a highly demoralised, demotivated and ill-disciplined teaching profession and student body. He has presided over a chaotic and incompetent administrative structure which has proved incapable of holding the system together.” p 6.

This study is based on a specific sample within a given time frame. The problems and challenges that teachers have to face must be understood in relation to the wider socio-economic context.

The context of this study is important. These findings reflect the views of a particular group of teachers. The teachers used in this study are from an urban area with well-established and resourced schools. In another setting, even within the Pietermaritzburg region, the teachers’ responses might have been different. In a rural area, for example, teachers’ primary source of stress may be escalating violence in schools or the lack of basic resources. A recent survey has shown that 25% of schools in Kwa Zulu-Natal have no water supply, 13% of schools have no toilets, 61% have no electricity, 51% have little or no text books and a backlog of 15 000 classrooms (Bridgraj, 1997).
6.2 IMPLICATIONS OF THIS STUDY

The extremely high distress level of the teachers in this sample warrants serious investigation and urgent intervention by the education authorities. Support for teachers is needed through this crucial time of transition. The pressure on teachers is tremendous, in the face of media reports and criticisms from parents and the community. If the necessary support is not provided urgently, teacher stress and burnout may reach even higher levels and this will ultimately have a negative impact on the entire education system. Media continually report the problems that teachers have to face, the failure of staff reduction and redeployment measures, possible retrenchment of thousands of temporary teachers, problems with provision of textbooks, inadequate facilities and poor results.

As a matter of urgency the focus of the education department should be the implementation of a recovery programme. The recovery programme could be implemented either through teacher organisations like the South African Democratic Teachers Union or the existing departmental network. This would save time and money. A representative (facilitator) from each school could be trained by professional psychologists, in identifying stress and burnout symptoms, stress management and basic counselling skills. They would be well-placed to run support programmes at schools and encourage teachers to discuss their concerns in a safe environment. These facilitators would need to receive continued support, training and assistance from the professional psychologists. The facilitator could also refer serious cases for psychological help, to other agencies.

The above programme could be maintained as a continuous stress-management and supportive structure for teachers in the education department’s welfare services. Incorporated into the welfare service could be staff development programmes, counselling, practical workshops, training on effective coping methods, problem-solving techniques and time management. Support programmes could save the education department thousands of rands by reducing absenteeism,
medical expenses and a reduction in the number of teachers applying for medical boarding.

As a pro-active measure, stress management should be included as an integral part of teacher-training. Student teachers could be trained to cope with the pressures of teaching, thus promoting the psychological well-being of future teachers.

Teachers are the key agents to change. No change in school would be successful without the positive and active support of the teachers. Any change in education should arise out of negotiation and consultation with the teachers. The vision of this change should be clear and shared by all personnel in the education department. The change should be seen as a challenge and as a new way of doing things rather than as a threat. An integral part of change should be psychological support throughout the planned changes. It should include a three fold plan. Firstly, a pre-change plan would be developed to help teachers cope with the anxiety, fears and anticipation of change. Secondly, a plan would be provided to support teachers through the change. This would help teachers to adjust to the changes and to discuss concerns that may arise in the change-process. Lastly, a post-change plan should be implemented to monitor teachers’ feelings. Stabilisation of the change will prevent regression to old ways.

6.3 STRENGTHS AND LIMITATIONS OF THIS STUDY

The aim of research in the social science is to provide accurate and reliable understanding of human behaviour and systematic procedures need to be followed. The strength of this study was in the design. It was a familiar design which has been tried and tested.

Very few procedural problems were encountered during this study. The use of standardised psychometric instruments provided norms against which the scores could be interpreted. The inclusion of a set of questions to localise and contextualise the study made it a current and topical one.
The familiarity of the author with the current situation contributed to a further understanding of the issues being assessed. This made it easier to obtain permission for the study and to discuss the issues with the education leaders.

It must be acknowledged that correlational studies are limiting, due to their incapacity to demonstrate causality. However, as the stress system is both complex and dynamic, it does not easily lend itself to reductionist or simplistic research. Few (if any) of the relationships between variables can be considered unidirectional.

Self-report questionnaires are useful and worthwhile. However, more objective measures are needed to show a clear association between the individual psychological and physical well-being and organisational factors that contribute towards stress. These objective measures may include absenteeism and medical records, in order to complement the picture provided by the data from the self-report measures.

This study concentrated on the impact of the current situation on teachers' professional role. However, stress invades all aspects of one's life. In this study, the impact on the teacher's personal lives was not examined. It would have enabled the researcher to understand the extent and effects of stress, if data had been collected on the amount of alcohol intake, drug taking, and incidence of marital disharmony.

Data were collected at the end of the school year (November). This is a stressful part of the year with the added pressure of marking, report-writing, and general closure requirements taking place. The above pressures could have contributed to the high distress scores.

6.4 RECOMMENDATIONS FOR FUTURE RESEARCH

Findings such as those presented open the way for a new range of research initiatives. Some of these may potentially be of considerable benefit to teachers operating in an increasingly demanding profession. Important topics of educational research could be
the multiple changes, contradictory pressures teachers have to cope with within schools and how they see their roles changing.

This study is relevant to the sample that was studied within a specific socio-economic-cultural setting and a limited time-frame. A replication of this study in other settings and contexts, might provide information that could be used when planning change. It would also provide an understanding of the well-being of teachers during the change process.

The stress and burnout issues that arise directly out of the teachers’ professional work are well researched. Understanding the teacher in the context of major organisational change still needs to be researched. South Africa is currently undergoing change at such an accelerated pace in all aspects of education that it creates an ideal setting for such research to be undertaken.

What is needed is a teacher-specific measure of stress and burnout, but one that is comprehensive enough to incorporate organisational pressures, personality predisposition and strain scales (Cooper 1995). Instead of being designed with specific hypothetical constructs in mind, e.g., the change in the teachers’ role or school discipline are linked to stress outcomes. It should include an array of potential stressor variables which range from job to organisational factors.

Stress and burnout occurs over a period of time. It is better, in terms of improving the accuracy of results, to do the survey at regular intervals. It would be useful to do a follow-up study at the end of the anticipated five year plan to reorganise education in South Africa.

Another interesting study would be to compare the recommendations of the Right Sizing Document with the actual change that occurred. The process of the change and reaction of the teachers, parents and community would be very useful for future planning. The latest news on the Right Sizing document is that it has been “put on
hold”. One can only speculate on the possible chaos in education, when the process of change is instituted and subsequently “put on hold”. The decision to put the Right Sizing Document “on hold” must indeed have been a prudent one on the part of the education authorities. In January 1998 the Right Sizing document was replaced with the HMRI circular. This document was totally rejected by teachers and the community, on the grounds that it was drawn up without consultation with teachers at grass root level. The HMRI circular announced the termination of temporary teachers’ services and set out teacher quotas to facilitate redeployment. In response to the document the various parent and teacher organisations threatened to close down schools in Kwa Zulu-Natal. Once again the education authorities reacted by withdrawing the contentious document (Pillay, 1998). The impact of such actions on teachers well-being needs investigation.

The reasons why teachers resist change are numerous and varied. Awareness of and insight into the reasons why teachers resist change will put the education department in a better position to manage the resistance to change. If the education department is to bring about successful change, they should be conversant with the reasons for resistance to change and to how teachers react to change. It would be useful to study this resistance aspect in education, to identify exactly what teachers resist and what is causing distress. This would provide useful information for future planning.
REFERENCE


de Haas, J. (1995). Some reflections as Previously Segregated schools become more integrated. What does the anti-racist debate have to offer? Unpublished paper, Department of Educational Psychology, University of Natal, Pietermaritzburg.


94.


In particular, attention is drawn to Resolution 3 of 1996, to the Procedure Manual, to paragraph 2 of F5 (Guidelines on the Procedure Manual), and to section 3.2 of HRM Circular No. 5 of 1996 (in particular to the first three paragraphs of that section).

The time is now appropriate for all educators (in whatever type of institution they serve) to apply for the voluntary severance package if they wish to do so.

The official form (Annexure A3), as supplied with HRM Circular No. 5/1996, should be used and applications should be submitted by 16 September 1996.

These applications should be accompanied by the form headed SECTION F: RETENTION OF KEY PERSONNEL, if applicable.

In order to facilitate the administration of this process, duplicates of the form (Annexure A3) should also be sent to:

The Chairman
Provincial Redeployment Agency
KwaZulu-Natal Department of Education and Culture
Private Bag 9044
Pietermaritzburg
3200

The accompanying documentation is for the information of all education institutions under the control of the KwaZulu-Natal Department of Education and Culture.

Some of the documents apply only to mainstream state and state-aided primary and secondary schools, because these are the institutions affected by the right-sizing programme at present.

Categories of education, namely: colleges, schools for LSEN and pre-primary schools will become part of the right-sizing process in due course, once agreements relating to staff downsizing have been reached. Documentation will be distributed directly and specifically to those institutions as soon as possible.

In addition, the following documents have general applicability:

F1 Glossary of Terms
F5 Guidelines on the Procedure Manual
F7 Addresses of Teacher Unions

For a better understanding of the process, however, the documents relating to the programme in schools should be read, since the process in other institutions will take a similar form.

Forms G1 - G3b are for the use of ordinary public and state-aided schools only.

Voluntary Severance

Information regarding the voluntary severance package is applicable to all educators.
THE SCOPE AND OBJECTIVES OF THIS DOCUMENTATION

The attached documents provide information and instructions to schools regarding the right-sizing programme by which posts at education institutions will be redistributed to give effect to the policy of equity in education.

The process is to be driven by a Provincial Task Team (PTT) and a Provincial Redeployment Agency (PRA). The former is a working group of the latter, but has been established as a responsible committee in its own right by the so-called Procedure Manual, which sets out the nationally agreed procedures to be followed in the process of right-sizing. These committees are departmental committees on which representatives of the teachers' unions serve as participants in the management of the programme.

The Procedure Manual, a copy of which is included, relates to the implementation of Resolution 3/1996. A copy of this important document is also included in order that the guiding principles underlying the process should be known and understood by all involved.

The attached documents do not deal with the voluntary severance package, although this is part of the right-sizing programme. The reason is that this aspect is excluded from the briefs given to the PTT and the PRA. Relevant information has already reached schools in other circulars.

The following documents are included and should be closely studied to facilitate a fuller understanding of the procedures and to ensure that everything required of schools is properly done.

- Resolution 3/1996
- The Procedure Manual
- An outline of the right-sizing programme
- Procedures to be followed by schools
- Various annexures
  - A glossary of terms used in resolutions
  - An interim staffing form (Step 1)
  - Pay norms for HODs and Deputy Principals
  - Pay norms for L/Ps and HOIs
  - Guidelines on the Procedure Manual (Cl: 1) and Redeployment
  - Written application to principal regarding the BRS
  - Address of educators' unions
  - Guidelines to the completion of the forms
- Various forms to be completed
  - Forms to be completed in consultation
  - BOD recommendations on excess educators
  - BODs forms for excess educators
  - BOD recommendations on excess educators
  - Directory of positions in excess
1.9(a) VOLUNTARY SEVERANCE PACKAGE

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The above-mentioned ratios are already agreed upon and still to be agreed upon. Noting the State's offer for a three-year conditions of service adjustment package for the public service, the objectives relating to the funding of education between the Provincial and National Governments should be undertaken in order to ensure equity in the funding of education between the Provincial and National Governments. These ratios have to be renegotiated annually. These norms are to be revised every five years commencing on 1 April 1995, according to post provision scales agreed to by the Provincial Chambers of the Council. These ratios have to be renegotiated annually. The norms for post-provisioning are the education ratios, post-provisioning ratios, and education ratios of benefits. These norms are within the framework of the different levels and regions which apply to the norms for post-provisioning. This agreement will have the same effect as national government agreements between the different levels and regions which apply to the norms for post-provisioning.

1.4 Educational ratios have already been agreed to, having into account a variety of factors, including availability by the State. These ratios are to be achieved by a maximum period of five years, commencing on 1 April 1995, according to post provision scales agreed to by the Provincial Chambers of the Council. These ratios have to be renegotiated annually. These ratios are to be achieved by the education ratios, post-provisioning ratios, and education ratios of benefits. These norms are within the framework of the different levels and regions which apply to the norms for post-provisioning. This agreement will have the same effect as national government agreements between the different levels and regions which apply to the norms for post-provisioning.

1.5 The Council is ready to negotiate on the norms concerning preliminary schools when the State submits proposals in this regard.

1.2 An agreement on the norms concerning preliminary schools should be reached within three months of the date of this agreement.

1.1 The above-mentioned agreement is hereby agreed upon and will be agreed upon for the 1997/1998 year.

1.0 The processes to be followed in the implementation of a revised draft preliminary schools agreement which will have the effect that such an agreement is reached, as outlined in paragraph 3 of Resolutions No. 18 of 1996, is as follows:

9.0 VOLUNTARY SEVERANCE PACKAGE

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The processes to be followed in the implementation of a revised draft preliminary schools agreement which will have the effect that such an agreement is reached, as outlined in paragraph 3 of Resolutions No. 18 of 1996, is as follows:

This agreement shall come into effect on 1 April 1995. The agreement is subject to the approval of the Minister of Education, who may, if he so desires, call upon the Council to amend the agreement in respect of the conditions of service for the purposes of promoting education and training of education staff.

1.0 The processes to be followed in the implementation of a revised draft preliminary schools agreement which will have the effect that such an agreement is reached, as outlined in paragraph 3 of Resolutions No. 18 of 1996, is as follows:

The processes to be followed in the implementation of a revised draft preliminary schools agreement which will have the effect that such an agreement is reached, as outlined in paragraph 3 of Resolutions No. 18 of 1996, is as follows:

The above-mentioned agreement is hereby agreed upon and will be agreed upon for the 1997/1998 year.
The functions of the CRA shall be:

(a) To establish a centralized computer data base of educators in excess. Information shall be provided by the provincial education departments of educators who have been identified as in excess. If a decision on the employment of such educators cannot be taken within 90 days of their identification as being in excess, the information shall be removed from the data base at Annexure A2.

(b) To keep a comprehensive central data base of educators to the extent through employment. The information shall be kept in the form as set out at Annexure A2.

(c) To ensure that complete required data is supplied promptly.

(d) To ensure that data is revised and updated regularly.

(e) To receive reports on decisions about transfers as required by each provincial education department on vacancies and positions available for teachers.

(f) To receive reports on decisions about transfers as required by each provincial education department on vacancies and positions available for teachers.

(g) To keep a comprehensive central data base of educators in excess. Information shall be provided by the provincial education departments of educators who have been identified as in excess. If a decision on the employment of such educators cannot be taken within 90 days of their identification as being in excess, the information shall be removed from the data base at Annexure A2.

(h) To keep a comprehensive central data base of educators in excess. Information shall be provided by the provincial education departments of educators who have been identified as in excess. If a decision on the employment of such educators cannot be taken within 90 days of their identification as being in excess, the information shall be removed from the data base at Annexure A2.

(i) To keep a comprehensive central data base of educators in excess. Information shall be provided by the provincial education departments of educators who have been identified as in excess. If a decision on the employment of such educators cannot be taken within 90 days of their identification as being in excess, the information shall be removed from the data base at Annexure A2.

(j) To keep a comprehensive central data base of educators in excess. Information shall be provided by the provincial education departments of educators who have been identified as in excess. If a decision on the employment of such educators cannot be taken within 90 days of their identification as being in excess, the information shall be removed from the data base at Annexure A2.

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(v) To keep a comprehensive central data base of educators in excess. Information shall be provided by the provincial education departments of educators who have been identified as in excess. If a decision on the employment of such educators cannot be taken within 90 days of their identification as being in excess, the information shall be removed from the data base at Annexure A2.

(w) To keep a comprehensive central data base of educators in excess. Information shall be provided by the provincial education departments of educators who have been identified as in excess. If a decision on the employment of such educators cannot be taken within 90 days of their identification as being in excess, the information shall be removed from the data base at Annexure A2.

(x) To keep a comprehensive central data base of educators in excess. Information shall be provided by the provincial education departments of educators who have been identified as in excess. If a decision on the employment of such educators cannot be taken within 90 days of their identification as being in excess, the information shall be removed from the data base at Annexure A2.

(y) To keep a comprehensive central data base of educators in excess. Information shall be provided by the provincial education departments of educators who have been identified as in excess. If a decision on the employment of such educators cannot be taken within 90 days of their identification as being in excess, the information shall be removed from the data base at Annexure A2.

(z) To keep a comprehensive central data base of educators in excess. Information shall be provided by the provincial education departments of educators who have been identified as in excess. If a decision on the employment of such educators cannot be taken within 90 days of their identification as being in excess, the information shall be removed from the data base at Annexure A2.
5.1.2.1 It is noted that the following guidelines for educators in the broader public sector shall be set out in Annexure E.

**Salary Bands and Levels**

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<tr>
<th>POST LEVEL</th>
<th>SALARY BAND</th>
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5.1.2.2 Educators shall be a separate salary structure group.

5.1.2.3 The number of posts and salary levels shall be reduced and post designations will be adjusted.

5.1.2.4 The existing system of allocating categories to educators' qualifications and attaching different salary scales to these categories is amended.

5.1.2.5 The minimum notch (rounded off) which shall consist of three salary ranges as set out below and agreed to those aspects applicable to educators.

5.1.2.6 The salary ranges shall consist of three salary ranges as set out below and agreed to in paragraph 5.1.2.1.

5.1.2.7 The minimum notch (rounded off) which will be subject to review by the Research Committee to address the impact which the collapsing of post levels 1 and 2 will have on the financial years 1997/98 and 1998/99.

5.1.2.8 The minimum notch (rounded off) which will be reviewed by the Research Committee to investigate the impact of the collapsing of post levels 1 and 2 on the financial years 1997/98 and 1998/99.
9.2 An amount of R6.5 billion on a full year cost basis shall be set aside for the improvement of conditions of service in the 1997/98 financial year. This amount can be supplemented with savings as a result of the right-sizing of the public service up to an amount of R11.3 billion (full year cost basis). This improvements shall be implemented with effect from 1 July 1997.

9.3 The parties agree that the implementation of the redeployment measures is a sector specific problem for the following reasons:

(a) The parties agree that the redeployment measures are a sector specific problem for the following reasons:

(b) The parties agree that the redeployment measures are a sector specific problem for the following reasons:

(c) The parties agree that the redeployment measures are a sector specific problem for the following reasons:

(d) The parties agree that the redeployment measures are a sector specific problem for the following reasons:

(e) The parties agree that the redeployment measures are a sector specific problem for the following reasons:

(f) The parties agree that the redeployment measures are a sector specific problem for the following reasons:

(g) The parties agree that the redeployment measures are a sector specific problem for the following reasons:

(h) The parties agree that the redeployment measures are a sector specific problem for the following reasons:

(i) The parties agree that the redeployment measures are a sector specific problem for the following reasons:

(j) The parties agree that the redeployment measures are a sector specific problem for the following reasons:

The agreement shall be reached within six weeks of the date of this agreement on the following matters:

(a) Matters regarding the salaries of educators who are not appointed on a full-time or part-time basis.

(b) Matters regarding the implementation of the new salary grading system, R2,625 billion (full year cost). The amount can be supplemented with savings as a result of the right-sizing of the public service.

(c) Conditions relating to the implementation of the new salary grading system, R2,625 billion (full year cost). This amount can be supplemented with savings as a result of the right-sizing of the public service.

(d) Conditions relating to the implementation of the new salary grading system, R2,625 billion (full year cost). This amount can be supplemented with savings as a result of the right-sizing of the public service.

(e) Conditions relating to the implementation of the new salary grading system, R2,625 billion (full year cost). This amount can be supplemented with savings as a result of the right-sizing of the public service.

(f) Conditions relating to the implementation of the new salary grading system, R2,625 billion (full year cost). This amount can be supplemented with savings as a result of the right-sizing of the public service.

(g) Conditions relating to the implementation of the new salary grading system, R2,625 billion (full year cost). This amount can be supplemented with savings as a result of the right-sizing of the public service.

(h) Conditions relating to the implementation of the new salary grading system, R2,625 billion (full year cost). This amount can be supplemented with savings as a result of the right-sizing of the public service.

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(g) Matters relating to the implementation of the new salary grading system, R2,625 billion (full year cost). This amount can be supplemented with savings as a result of the right-sizing of the public service.

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(i) Matters relating to the implementation of the new salary grading system, R2,625 billion (full year cost). This amount can be supplemented with savings as a result of the right-sizing of the public service.

(j) Matters relating to the implementation of the new salary grading system, R2,625 billion (full year cost). This amount can be supplemented with savings as a result of the right-sizing of the public service.
1. OBJECTIVE
   To provide a mechanism which will facilitate the voluntary resignation of educators to attain equity in the provision of personnel.

2. MEASURES GOVERNING VOLUNTARY TERMINATION OF SERVICE
   (1) Any educator may volunteer for a severance package or to resign from the service in order to create room for the appointment of educators who are in excess, and to afford educators who prefer to leave the service the opportunity to do so.

   (2) Departments should seriously consider approving requests of personnel relating to the voluntary termination of their services in view of the objective stated in paragraph 1 above.

   (3) In considering such requests, departments shall not take into account that after consulting the relevant educator, the effective date or duration of service at key personnel can be postponed for a certain period in order to allow for suitable replacements. The period must not exceed 12 months. The municipality must be informed in writing and no additional funds will be paid for this purpose.

   (4) For purposes of determining which requests should be regarded as "key personnel", as contemplated in (3) above, the usual criterion to ensure that personnel are not interfered with in any way is to be used.

   (5) Should it not be possible for the head of the relevant department to approve requests for voluntary resignation or to resign from the service in view of the objective stated in paragraph 1 above, the relevant MEC may refer the matter to the Minister for a final decision.

3. PAYMENTS
   (1) Individual requests must be in writing on a prescribed form and must be accompanied by a signed letter of recommendation.

   (2) The employer shall determine the candidates who qualify themselves for voluntary termination of service and, if so, the amount of such termination of service shall be calculated as follows:

   a) Gratuity - calculated as follows:

   \[ \text{Gratuity} = \begin{cases} x \times 30 \times 120 \\ x \times 36 \times 240 \\ x \times 48 \times 480 \end{cases} \]

   where:
   \( x \) = member's period of pensionable service
   \( N_1 \) = member's age and the age of the spouse

   b) Pension benefit - to be determined in accordance with the pension provisions of the relevant pension fund.

   c) Severance package - to be determined in accordance with the provisions of the relevant pension fund.

4. SEVERANCE PACKAGE APPLICABLE TO EDUCATORS WHO HAVE VOLUNTARILY IDENTIFIED THEMSELVES TO BE DISCHARGED IN TERMS OF THIS SPECIAL INITIATIVE
   A severance package consisting of the following elements:

   a) Pension benefits
      The following pension benefits are payable:
      (i) Members of the Government Pension Fund: To a member who has attained the age of 55 years who has completed at least 15 years of pensionable service. A gratuity equal to the greater of:

      \[ \text{Gratuity} = \begin{cases} x \times 30 \times 120 \\ x \times 36 \times 240 \\ x \times 48 \times 480 \end{cases} \]

      where:
      \( x \) = member's period of pensionable service
      \( N_1 \) = member's age and the age of the spouse

      (ii) A gratuity equal to the greater of:

      \[ \text{Gratuity} = \begin{cases} x \times 30 \times 120 \\ x \times 36 \times 240 \\ x \times 48 \times 480 \end{cases} \]

      where:
      \( x \) = member's period of pensionable service
      \( N_1 \) = member's age and the age of the spouse

   b) Severance pay
      To pay the remuneration for each completed year of continuous service within the broader public service.
Other Service Benefits

(a) Vacation Leave Credit

A leave gratuity is paid in terms of the provisions and measures in the Regulations, made in terms of the Educators’ Employment Act, 1994 (the Regulations).

(b) Home Owner Allowance

An amount is paid equal to a maximum of six times the monthly home owner allowance payable in terms of the Regulations for which the person concerned qualified on his or her last day of duty.

(c) Official Quarters

Occupation of official quarters may be continued for a period not exceeding one month. A person's evacuation of official quarters after expiry of one month must nevertheless be postponed for a maximum period of three months if it is deemed necessary to avoid serious hardship.

(d) Medical Assistance

Benefits are paid in accordance with the measures in the Regulations, which make provision for medical assistance to educators on retirement or the termination of their services. A proposed revised set of measures in this regard is at Annexure C. In cases where officials do not immediately qualify for medical assistance in terms of these measures, a cash amount equal to a maximum of six times the maximum monthly employer contribution payable in terms of these measures to the medical scheme of which the person concerned was a member on the last day of duty, shall be paid.

(e) Pro Rata Service Bonus

A pro rata service bonus is payable.

(f) Service Obligations

Exemption from service obligations shall be granted. For the purposes of this subparagraph, service obligations include, but are not limited to, all contractual obligations arising from study/training agreements and agreements with regard to military training. Exemption according to this subparagraph does not include other debt a person may have, e.g., in terms of the Motor Finance Scheme for Senior Officers or subsidised motor transport.

(g) Resettlement Benefits

Resettlement benefits in terms of the Regulations are payable with the exception that any person older than 55 years of age qualify. This age restriction does not apply to persons who have to evacuate official quarters at their headquarters in order to occupy other suitable accommodation at such headquarters.

(h) Period of Notice

The minimum period of notice is one month unless a service contract specifically provides for a longer period. Notice of terminating a person in service for the full period of notice. No severance pay may be paid to a person who is dismissed with his or her consent at the beginning of or during the notice period. In such circumstances a further package which covers the unexpired period of notice up to the date of discharge, shall be calculated in addition to the normal package and be paid out in the form of a once-off, all-inclusive amount to compensate for the undermentioned service benefits:

(i) Pensionable salary

(ii) Fixed remuneration allowances

(iii) Pro rata service bonus

(iv) Subsidised Motor Transport

(v) Cash value of the vacation leave which is forfeited.

(i) Motor Finance Scheme for Senior Officers

An amount shall be paid equal to a maximum of six times the monthly basic allowance payable in terms of the Regulations for which the person concerned qualified on his or her last day of duty.
PROCEDE MANUAL FOR THE IMPLEMENTATION OF RESOLUTION 3/1996

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Note: This document has been copied from the Manual supplied by the Department of Education (national) and has been reproduced only by the addition of paragraph numbers (for the sake of easier reference.)

PURPOSE

The Procedure Manual has been compiled to assist those involved in managing and implementing the right-sizing of education institutions. Its purpose is to set out the procedural and substantive measures as required by Resolution 3 of 1996 of the Education Labour Relations Council (ELRC) and to clarify and expand on the said resolution in a way that is accessible or seeks to simplify the inclusion.

Any individual using this manual should therefore not read into it any personal interpretation or procedure. Should any individual be unsure of what is required of him or her in exercising any duty or function which arises from the implementation of Resolution 3 of 1996 or this manual, such individual should seek clarification from their head of department or a designated person or body.

set out further details of the necessary contact persons and information on an addendum to this manual. In the event of provincial education department not being clear on matters emanating from this manual, clarification should be sought from the Inter-Provincial Task Team (IPPT).

2. BACKGROUND

On 30 April 1996 agreement was reached on a three-year conditions of service adjustment package for educators. The agreement also provided for the right-sizing of educational institutions which includes the redeployment of teachers who are in excess of the establishments.

Paragraph 10(a)(vi)(iv) of the Agreement provides that:

"An agreement will be reached with the Bargaining Committee of the Council within three weeks of this agreement on a procedure manual which shall deal with the procedures and procedures relating to the redeployment of teachers who are in excess."

It is important to note that the voluntary severance package will be available until sufficient response has been elicited and that it will run concurrently with natural attrition and redeployment.

3. MATTERS FOR INCLUSION IN THE MANUAL

The following matters identified in the Agreement are covered in the Manual:

3.1 Identification of staff in excess and shortages (para 10(a)(i) and (ii))
3.2 Functions, powers and procedures to be followed by the School/College Right-Sizing Committee (SRCC) (para 10(a)(ii)(aa))
3.3 Functions and procedures of the Provincial Task Team (PTT) (para 10(a)(iv))
3.4 Functions and procedures of the Provincial Redeployment Agency (PRA) (para 10(a)(v))
3.5 Functions and procedures of the Inter-Provincial Task Team (IPTT) (para 10(a)(vi)) and Resolution No. 3 of 1996, as interpreted by Resolution No. 11 of 1996
3.6 Functions and Procedures of the Inter-Provincial Task Team (IPTT) (para 10(a)(vi))
3.7 Voluntary Severance Packages (para 2)
3.8 The School/College Right-Sizing Committee (SRCC)
3.9 The Provincial Task Team (PTT)
3.10 The Provincial Redeployment Agency (PRA)
3.11 The Inter-Provincial Task Team (IPTT)

The Agreement provides that:

"An agreement will be reached with the Bargaining Committee of the Council within three weeks of this agreement on a procedure manual which shall deal with the procedures and procedures relating to the redeployment of teachers who are in excess."

Any individual using this manual should therefore not read into it any personal interpretation or procedure. Should any individual be unsure of what is required of him or her in exercising any duty or function which arises from the implementation of Resolution 3 of 1996 or this manual, such individual should seek clarification from their head of department or a designated person or body.

4. RESPONSIBILITIES, FUNCTIONS, COMPOSITION AND PROCEDURES OF COMMITTEES

4.1 In the final analysis overall responsibility for the implementation of the Agreement lies with the provincial education department as employer. In this process other parties to the ELRC should be encouraged to play a supportive role. At various levels and stages of the process responsibility for voluntary severance and redeployment may also devolve upon others, such as:

- in identifying staff in excess - the SRCC
- in identifying staff in excess - the PRA
- in identifying staff in excess - the IPTT
- in general co-operation all CS educators and governance structures

4.2 Throughout the process of applying voluntary severance and redeployment, the rules of natural justice shall apply.
4.3 The School/College Right·sizing Committee

A S/CRC shall be established at each school/college by the representative of the provincial education department, where educators are in excess as well as where it is not possible to absorb these educators within 14 days of the commencement of the third school term in 1996. (Note: This has been further clarified by an amendment allowing that even schools not having a right·sizing committee may have one.) Furthermore, the time frame given has to be flexible.

The task of the S/CRC will be to recommend to the provincial education department whether, and if so, which educators shall be regarded as being in excess and which vacancies exist at a specific school/college. The S/CRC shall advise the provincial education department about the revised interim core curriculum needs of the schools and all other relevant factors. It is the responsibility of the S/CRC to advise the provincial education department about the revised interim core curriculum and interim curriculum needs.

4.3.3 The Chairperson

The Chairperson shall be the representative of the provincial education department and all the case of state·aided schools via the governing body, which educators at the school/college are in excess and which vacancies exist at the school/college. Educators not yet redeployed to the CRA, informed concerning the progress of the process and otherwise: The Provincial Redeployment Agency (PRA) and the Central Redeployment Agency (CRA) will be involved in the S/CRC.

Should the S/CRC not be clear on any of its functions or the requirements of Resolution 3 of 1996, the provincial education department shall provide the necessary assistance to the S/CRC.

4.3.2 Composition

The S/CRC shall be composed as follows:

- A representative from the relevant provincial education department, who can also be the head of the school/college.
- The head of the school/college where such head is not the educator or the principal, the educator shall be regarded as a key personnel, with due regard being given to the prevailing circumstances at the school/college.
- The principal of the school/college at the school/college concerned or another representative of the staff council, and the chairperson of the S/CRC.

The Chairperson shall convene the first meeting of the S/CRC within 10 days of notification. The S/CRC shall submit its recommendations on the educators in excess within 30 days of notification, whereby vacancies exist at specific institutions to the provincial education department, and in the case of state·aided schools via the governing body.

Note: The S/CRC shall familiarise itself with the contents of Resolution 3 of 1996 and this manual. The S/CRC must also be familiar with the revised interim core curriculum needs of the schools and all other relevant factors. It is the responsibility of the S/CRC to advice the provincial education department about the revised interim core curriculum and interim curriculum needs.

Based on the agreed learner·educator ratio, the S/CRC must determine the number of educators in excess.

4.3.3 Procedure

The following procedure shall apply:

- The Chairperson shall convene the first meeting of the S/CRC within 10 days of notification.
- The S/CRC shall submit its recommendations on the educators in excess within 30 days of notification, whereby vacancies exist at specific institutions to the provincial education department, and in the case of state·aided schools via the governing body.
- The S/CRC must take into account the revised interim core curriculum needs of the schools and all other relevant factors. It is the responsibility of the S/CRC to advice the provincial education department about the revised interim core curriculum and interim curriculum needs.

Note: The provincial education department shall adopt a holistic approach when dealing with educators in excess. The S/CRC must take into account the revised interim core curriculum needs of the schools and all other relevant factors. It is the responsibility of the S/CRC to advice the provincial education department about the revised interim core curriculum and interim curriculum needs.

The PIT shall be constituted in accordance with the specific needs of the province, but shall include, at least:

- A representative of the provincial education department;
- A representative of the Provincial Teachers' Union (PTU); and
- A representative of the Provincial Chamber of the Education Labour Relations Council (PTC).

The PIT shall be constituted in accordance with the specific needs of the province, but shall include, at least:

- A representative of the provincial education department;
- A representative of the Provincial Teachers' Union (PTU); and
- A representative of the Provincial Chamber of the Education Labour Relations Council (PTC).
4.4.5 The PIT may co-opt additional members to meet such needs as may arise.

Note: If a notice in a number of provinces is arrangements, considering the personal circumstances of educators referring to the functioning of the provincial chambers, and the PIT may be unable for the composition of the PIT.

4.4.5.1 Procedures

The PIT shall be responsible for the data base to be used for the province for the redeployment of educators.

- The PTT shall ensure that the particular educators identified by the S/CRC as being in excess are identified on the data base.

- The PIT shall review all records prior to the PTT's guidelines in order that the S/CRC can be utilized by all provinces.

- The PIT shall ensure that the educational identification provided by the S/CRC as being in excess are identified on the data base.

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4.4.5.2 The PIT may co-opt additional members to meet such needs as may arise.

4.4.6 The PITT may co-opt additional members to meet such needs as may arise.

Note: If a notice in a number of provinces is arrangements, considering the personal circumstances of educators referring to the functioning of the provincial chambers, and the PIT may be unable for the composition of the PIT.

4.5 The PITT may co-opt additional members to meet such needs as may arise.

4.6 Functions

The functions of the PITT are those identified in articles 6 of Resolution No. 3 of 1996 (the same as that of the CRA).

- To coordinate the transfer of educators identified as being in excess between provinces;

- To establish and update a data base for the redeployment of educators identified as being in excess and transferable between provinces;

- To receive reports from the S/CRC, PTTT and the PIT on educators identified as being in excess;

- To advise the CRA on the redeployment of educators both inter- and intra-provincially as well as on other matters regarding the redeployment of educators which will enable the CRA to advise the Director-General of Education, the relevant heads of provincial education departments and the ELRC.

- To conduct research and investigations to establish the functions and progress of the PITT.

- To advise the CRA on the redeployment of educators both inter- and intra-provincially as well as on other matters regarding the redeployment of educators which will enable the CRA to advise the Director-General of Education, the relevant heads of provincial education departments and the ELRC.

- To coordinate and monitor the functions and progress of the PITT.

- To advise the CRA on the redeployment of educators both inter- and intra-provincially as well as on other matters regarding the redeployment of educators which will enable the CRA to advise the Director-General of Education, the relevant heads of provincial education departments and the ELRC.

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SEVERANCE

1. The Position of the Temporary Educator:

There are three classes of temporary educator:

(a) Substitutes for teachers in posts substituting for a permanent incumbent who is temporarily on leave, acceptance, or maternity leave, and who, when due to return to the post at some future date,

- Should a permanent replacement for a temporary teacher be appointed, the temporary teacher will terminate on the date that the permanent replacement takes up the post, with the proviso that the temporary teacher shall be given at least one month's notice of the termination of their contract.
- Where the services of substitute teachers have been utilized in a way that they have been deemed necessary to maintain the continuity of education, the position of substitute teachers will be considered individually on the merits when deciding whether they should be treated in the same manner as permanent educators.

(b) Part-time Teachers:

In terms of the right to apply for voluntary severance, they may be employed or remain in their current positions until there are no substitute part-time teachers or substitute permanent teachers. The temporary appointment shall be in the same manner as permanent teachers.

(c) Temporary Teachers in Substitutive Posts:

In terms of the right to apply for voluntary severance, they may be employed or remain in their current positions. The temporary appointment shall be in the same manner as permanent teachers.

Note: For the purposes of the voluntary severance package and the application for voluntary severance, temporary teachers shall be considered as equal in status to their permanent counterparts when determining the ranking order of the institution.

5.2.2 Date of Calculation of Benefits

Where severance occurs at the conclusion of the normal or normal period of notice, benefits are calculated in terms of the provisions applicable on the date of notification of discharge irrespective of the date of termination of service. Benefits other than the pension benefits shall be determined in terms of the salary applicable on the last day of service. Pension benefits are calculated as provided for in Annexure A of Resolution No.3 of 1996.

5.2.3 Key Personnel

The S/CRC (Council, and after consulting with the relevant educator(s), recommends to the provincial education department which educators should be regarded as key personnel. In their determination the S/CRC shall give due consideration to:

- the uninterrupted delivery of the education programme at the institution, and
- the proposed period required for the suitable filling of the post(s).

5.2.4 Formal notification of outcome

The individual and higher institution should be formally notified by the provincial education department of the outcome of an application for severance within 60 days of lodging the application. Should the application be successful, the date of termination of service should be reasonable and should be balanced against the educational needs of the institution and the ability of the relevant provincial education department to implement the severance of the requested benefits. In the case of applications which are refused, the applicant should be advised to approach the provincial education department for further assistance.

5.2.5 Cancellation of Application

Educators who have already submitted their applications for the voluntary severance package have the right to withdraw their applications. Furthermore, an individual educator may apply for the withdrawal of an application for severance up to 7 working days after the date of the letter by the provincial education department declaring them as a key personnel.

5.2.6 Benefits

Benefits paid to educators shall be in terms of the relevant clauses of the agreement, which should be explained to staff members by the relevant provincial education department. Special emphasis needs to be placed on the fact that while pension benefits are based on a period of service, severance pay is based on years of actual continuous service.

6. SCHOOL/COLLEGE ESTABLISHMENT

This shall be conducted according to the relevant national and provincial agreements and shall be provided to each institution by the relevant provincial education department. Special emphasis needs to be placed on the fact that while pension benefits are based on a period of service, severance pay is based on years of actual continuous service.

7. IDENTIFYING STAFF IN EXCESS (refer paragraph 4.3)

The process of identifying staff in excess shall commence immediately. This process runs parallel with the process regarding the voluntary severance package. Reimbursement shall take place according to the relevant agreements on the voluntary severance package becomes available.

8. The residual staff complement is defined as the existing staff complement before the implementation of the agreement upon post-occupancy. It includes all staff employed as permanent teachers and heads of departments for the specific year, minus the number of staff who have applied for voluntary severance.
6. FILLING OF VACANCIES

6.1 Vacancies that may be filled in any of the following three ways:

(a) Where the currently appointed learner/educator ratio in the school exceeds the ratio as prescribed in the relevant Memorandum, a new position may be created in accordance with the agreed upon ratios. All new positions created shall be filled with permanent staff. Where there is a discrepancy between the number of posts and the number of educators, the surplus educators shall be redeployed according to the agreed upon procedures.

(b) As a result of death, resignation, retirement, or termination of employment, a position may fall vacant without exceeding the negotiated staffing norms. In such cases, the new position shall be filled with voluntary severance of educators who have been approved for redeployment. Where the position falls vacant due to death or retirement, the new position shall be filled with voluntary severance of educators who have been approved for redeployment.

(c) If a post becomes vacant due to retirement, the position may be filled with voluntary severance of educators who have been approved for redeployment. Where the position falls vacant due to death or retirement, the new position shall be filled with voluntary severance of educators who have been approved for redeployment.

6.2 Vacancies that cannot be filled satisfactorily in terms of the above and where, for example:

(a) There is no suitable candidate for the position.

(b) The position cannot be filled due to the lack of sufficient candidates.

(c) The position cannot be filled due to the lack of sufficient candidates within the province.

6.3 Vacancies that cannot be filled satisfactorily in terms of the above and where, for example:

(a) there is no suitable candidate for the position.

(b) the position cannot be filled due to the lack of sufficient candidates.

(c) the position cannot be filled due to the lack of sufficient candidates within the province.

6.4 A Suitable Post:

A suitable post means:

(a) a post which is reasonably competitive with the post of the educator involved at the time of qualification as an educator.

(b) a post which is reasonably competitive with the post of the educator involved at the time of qualification as an educator.

(c) a post which is reasonably competitive with the post of the educator involved at the time of qualification as an educator.
9. REDEPLOYMENT

Educators identified as being in excess (refer paragraph 7) shall be redeployed in terms of the following measures:

9.1 Once identified and registered as in excess and redeployable, educators may apply for vacant positions as provided for in paragraph 8.2.

9.2 Candidates who are suitably placed will move to their new posts after at least one calendar month's notice of transfer (Regulation 10 of the Regulations regarding the Terms and Conditions of Employment of Educators).

9.3 In the case where a responsible offer has not been made to an educator, and:

- the area can usually fill such vacancy;
- the candidate is acceptable to the receiving institution;

such educator shall either:

- accept the offer, or
- have further name placed on the provincial redeployment list.

9.4 After 30 days on a provincial redeployment list candidates who have not been suitably placed will automatically have their names added to the inter-provincial redeployment list.

9.5 The PIT and IPIT shall ensure that adequately qualified and willing candidates will:

- be offered at least five posts, or at least five times the vacancies exist, to all such posts, provided that these vacancies may be offered simultaneously to other interested provinces and that the candidates respond positively within the specified time and receive priority;
- choose either to accept a post or opt for voluntary redeployment, if this option is still available.

9.6 In terms of paragraph 9.5 above, where a candidate redeplaces a shorter staff, immediately, a vacancy of two candidates will be offered at State expense in order of preference, and the candidate(s) must respond positively and that the candidates respond positively within the specified time and receive priority.

9.7 Where applicable, the costs involved in respect of movement shall be borne by the receiving provincial education department.

10. DISPUTES

Disputes shall be dealt with as provided for in the Constitution of the ELRC. Provincial education departments will, however, ensure that grievances be dealt with at an early stage and as close to source as possible, in order to avoid unnecessary frustration and conflict, and make use of informal dispute resolution procedures.

11. SUPPORT GROUP ASSISTANCE PROGRAMMES

The ELRC and the provincial education departments will be jointly responsible for dealing with assistance programmes in respect of educators affected by retrenchment.
THE RIGHT-SIZING OF POST ESTABLISHMENTS IN ORDINARY PUBLIC AND STATE-OWNED SCHOOLS

1.1 Agreements reached in the Education Labour Relations Council (ELRC) Chamber 3, 5, 6, 8 and 9 have determined that the right sizing exercise should proceed according to agreed procedures.

1.2 These procedures are supplemented by agreements reached in the provincial ELRC Chambers.

2.1 The right-sizing exercise must be seen as a process, and not a simple event, which will lead to equity in the staffing of schools and other educational institutions.

2.2 Agreements in the ELRC have identified April 2000 as the latest date by which equity must be achieved.

2.3 The various parties to the provincial ELRC Chamber have consulted with the staff of the principal Department of Education and Culture that equity should be achieved as soon as possible, and a time frame of 2 years was agreed in the Management Plan.

2.4 Similarly, equity will be achieved by learner-educator ratios of 35:1 in primary and secondary schools respectively.

2.5 Post-positioning again for technical colleges, colleges of further education and schools for the blind and deaf agree and are to be implemented before April 2000.

2.6 Syndicate, national norms for the principle of deployment and the levels of deployment will be achieved before this date (Annexure 1).

2.6.1 The agreed norms for 1995-96, contained in Annexure 1, will be implemented at the same time as the initial Staffing Norm (Step 1).

2.6.2 It should be noted that these promotion post norms will be based on the initial Staffing Norm for which a final post establishment is allowed. Within this establishment, a number of HOD and Principal posts will be allocated. These promotion posts are not additional to the establishment.

2.6.3 The implied number of posts will, in practice, be expected to keep up with inflation, but even so, the number of educationists will not be excessive. At this time, the Interim Staffing Norm (Step 2) will be introduced. Now there will only be two categories of schools, viz.

(i) schools which are more favourably staffed than the agreed norms of 40:1 and 35:1;

(ii) schools which are less favourably staffed than the agreed norms of 40:1 and 35:1.

2.6.4 The implication of this is that schools categorised in (i) above will be able to shed posts to achieve conformity to the Interim Staffing Norm (Step 2).

2.6.5 These posts will be reallocated to schools categorised in (ii) above.

2.6.6 Schools categorised in (ii) above will be unaffected. (This means that they will neither gain nor lose posts.)

2.6.7 The implementation of this step is expected to release just over 3,000 posts for redeployment. One number is more favourable posture of schools, but this will be achieved by another 3,000 or so posts of bringing their schools up to the agreed norms of 40:1 and 35:1.

2.6.8 At this time the Final Staffing Norm (Step 3) will be introduced. Now there will only be two categories of schools, viz.

(i) schools less favourably staffed than the agreed norms of 40:1 and 35:1;

(ii) schools which are more favourably staffed than these norms.

2.6.9 Schools in category (i) will be able to reallocate posts to schools in category (ii) with the number of posts which will be reallocated to them. These posts will be shed by the schools in (i), but will be insufficient in number to bring them down to the agreed norms.

2.6.10 At this time the Final Staffing Norm will be introduced. This will bring all schools into equitable staffing, except where the staffing norm determined on the basis of the number of occupied subjects, for example.

3.1 The following time frame is planned.

3.1.1 Introduction

The Final Staffing Norm (Step 3) will be introduced.

Favourably staffed schools, those referred to in (i) of para 3.1.1, will experience no posts and educators in terms of this norm. The number of schools in this category or Step 3 by August 1996 will be useful in this exercise.

3.1.2 Less favourably staffed schools, those referred to in (ii) of para 3.1.1, will experience:

a) their average subject workload reduced to a level which may be achieved by staff in other schools;

b) their physical capacity to accept additional educators.

Following the introduction of the Final Staffing Norm (Step 3), the exercise will reduce the resultant subdivision of educators for vocational purposes on the part of those wishing to leave the service and the identification of those in need, and therefore available for redeployment. And, after, the actual redeployment of some, if not all, of these educators.

3.2 A three-step process is planned, as follows.

3.2.1 Step 1: The schools categorised in (i) above will be able to shed posts to achieve conformity to the Interim Staffing Norm (Step 2).

3.2.2 Step 2: At this time, the Interim Staffing Norm (Step 2) will be introduced. Now there will only be two categories of schools, viz.

(i) schools which are more favourably staffed than the agreed norms of 40:1 and 35:1;

(ii) schools which are less favourably staffed than these norms.

3.2.3 Step 3: At this time the Final Staffing Norm will be introduced. This will bring all schools into equitable staffing, except where the staffing norm determined on the basis of the number of occupied subjects, for example.

3.3 The following time frame is planned.

3.3.1 Introduction

The Final Staffing Norm (Step 3) will be introduced.

Favourably staffed schools, those referred to in (i) of para 3.3.1, will experience no posts and educators in terms of this norm. The number of schools in this category or Step 3 by August 1996 will be useful in this exercise.

Less favourably staffed schools, those referred to in (ii) of para 3.3.1, will experience:

a) their average subject workload reduced to a level which may be achieved without any additional educators.

b) their physical capacity to accept additional educators.

Following the introduction of the Final Staffing Norm (Step 3), the exercise will reduce the resultant subdivision of educators for vocational purposes on the part of those wishing to leave the service and the identification of those in need, and therefore available for redeployment. And, after, the actual redeployment of some, if not all, of these educators.

3.4 Within the framework of agreements and procedures, three main categories of schools may be identified:

(i) schools which are more favourably staffed than the agreed norm of 40:1 and 35:1;

(ii) schools which are less favourably staffed than the agreed norm of 40:1 and 35:1, but less favourably staffed than the Interim Staffing Norm (Step 2);

(iii) schools which are more favourably staffed than the Interim Staffing Norm (Step 2).

3.5 The following time frame is planned.

3.5.1 Introduction

The Final Staffing Norm (Step 3) will be introduced.

Favourably staffed schools, those referred to in (i) of para 3.5.1, will experience no posts and educators (v) of this norm. The number of schools in this category or Step 3 by August 1996 will be useful in this exercise.

Less favourably staffed schools, those referred to in (ii) of para 3.5.1, will experience:

a) their average subject workload reduced to a level which may be achieved by staff in other schools;

b) their physical capacity to accept additional educators.

Following the introduction of the Final Staffing Norm (Step 3), the exercise will reduce the resultant subdivision of educators for vocational purposes on the part of those wishing to leave the service and the identification of those in need, and therefore available for redeployment. And, after, the actual redeployment of some, if not all, of these educators.
By the beginning of 1997, all redeployment associated with this step will have been completed.

3.3.2 By April 1997, the Interim Staffing Norm (Doc C/4.3.2) will be introduced and the process described in 3.3.1 above will be repeated so that at the commencement of the school year in January 1998, no school will be more favourably staffed than the establishment determined by the Interim Staffing Norm (Doc C/4.3).

3.3.3 By April 1998, the Final Staffing Norm will be introduced and the process repeated.

It should be noted that:

a) The Interim Staffing Norm will be applicable only to more favourably staffed schools. It is a norm which enables the reshuffling of posts. It will not be possible for schools to gain posts to move upwards to this norm.

b) Educators may be redeployed during 1995, 1996 and 1997. On the other hand, they may be retained in their posts until the end of the school year if their transfer would disrupt the school's ability to fulfil the curriculum needs of its learners.

c) The voluntary severance package may be offered by the Minister of Education and Culture in years subsequent to 1998.

d) The plan set out above may be affected by local circumstances, the province will have to provide education within the constraints of its budget allocation.

e) A growth in learner numbers may also have an impact on how the process unfolds. (The figures quoted are based on a 1.5% growth in enrolment.)

4. SCHOOLOCOLLEGE RIGHT-SIZING COMMITTEES

4.1 It is necessary for each school to establish a School/College Right-Sizing Committee (S/CRC) in terms of the procedures set out in the Procedure V (Doc C/4.3) and below.

(The responsibility for establishing the S/CRC rests with the principal, or another representative of the department (see 4.3.1). A formal letter of appointment is included in the documentation as Annexure D7. (Doc C/4.3).

4.2 The S/CRC will be required to identify, for recommendation to the provincial education department, excess posts and educators in the case of unfavourably staffed schools, as well as vacancies in the case of less favourably staffed schools and, indeed, other cases where vacancies may exist as a result of educators being granted severance, or being transferred, despite there being an excess of posts, there may also be a critical vacancy. (Doc C/4.3)

4.3 In addition, the S/CRC should regard itself as being responsible for evaluating whether the existing complement of posts (the nature of the posts, not the number) is appropriate for the curriculum needs of the pupils. In some cases, teachers will be asked to new schools, for example, without sufficient attention being paid to the curriculum needs of the pupils. It is also possible that a school may not be able to offer additional subjects unless a post is created by redeployment. It is a concern, for example, that some pupils are being deprived of the opportunity of studying Zulu because the existing staff cannot: (see letter accordingly) (Doc C/4.3).

4.4 The S/CRC is also required to confirm the internal or external in the questionnaire.

4.5 Composition of the S/CRC (Doc C/4.3.1)

Please note:

1. The principal or acting principal of the school will establish the S/CRC on behalf of the department and take responsibility for its chairmanship.

2. Should a situation arise where it is not possible for the principal/acting principal to fill the role of departmental representative on this committee, the department should be notified immediately and an alternative representative will be appointed.

3. Three (3) educators will be elected by the whole teaching staff of the school, in schools where the staff establishment is 3 or less, all members of staff should participate in the election.

4. In the case of a state education institution, a representative of a functioning governing body, as an observer, or in the case of a state-aided school, two members of the Governing Body (which is the co-employer) as full members.

(Note: The enactment of the SA Schools' Bill will remove this distinction and all governing bodies will enjoy equal status)

4.6 Functions of the S/CRC (Doc C/4.3.1)

Please note:

1. The primary function of the S/CRC, in the case of unfavourably staffed schools, is to identify and recommend, in terms of laid-down criteria and procedures, which posts and educators are in excess and therefore eligible for placement on the Redeployment Register.

2. It has the function, too, of identifying and describing vacancies which may exist, or which may occur, and presenting them in forms of the school's needs. This is necessary to balance the composition of a list of vacancies.

(Note: It is possible to have vacancies even in a school where an excess has been identified.

A post which may be vacant as a result of attrition or voluntary discharge may not be immediately considered the curriculum needs of the school).

3. A further function is the identification of key personnel. This relates to the voluntary severance package (SHRM Circular No 5/1996: 4.9 and Annexure A3 (P)).

4. It is clear that, as this process unfolds, it will be necessary for the school to give careful consideration to the academic programme of the school, especially with regard to specialist subjects in the primary phase and subject options and packages in the secondary. A decrease in the post establishments in favourably staffed schools is inevitable and, consequently, subject choices will have to be limited. The S/CRC should regard it as part of its responsibility to address this aspect of rationalisation as well.

4.7 Procedures to be followed by the S/CRC (Doc C/4.3.5)

Please note:

1. The S/CRC should be put in place within 10 days of receipt of this circular.

2. Within 30 days of being convened, the S/CRC shall submit its recommendations (see Forms E2a/b, 3a/b) to the Chairperson, Provincial Redeployment Agency, KwaZulu-Natal Department of Education and Culture, Pietermaritzburg 3200.

(Note: In the case of state-aided schools, submissions must must be made to the Governing Body.)
3. These recommendations must be accompanied by a record of minutes of all meetings of the S/CRC and a final report of the S/CRC signed by all its members to certify that it reflects the decisions of the committee as well as the reasons for such decisions. Copies of all documentation must be included.

4.8 General principles by which the S/CRC should operate

4.8.1 Since the curriculum needs of the school are to be considered at all times, the first task of the committee, in the case of a favourably staffed school, is to identify dispensable posts. Therefore, consideration should be given to whether educators may be regarded as being in excess.

4.8.2 The process should be as transparent, objective and inclusive as possible.

4.8.3 Considering the sensitivity of the matter, it must be recognised that labour disputes could arise.

4.8.4 In the case of primary schools, the process should be as follows:

4.8.5 Excesses may occur in the total post establishment, as well as in terms of the number of HODs or Deputy Principal posts. These are supposed to make a decision in excess and make arrangements for redeployment. (This does not apply to principals, who cannot be in excess.)

4.8.6 In giving consideration to excess HODs or Deputy Principals, the revised post levels shall apply.

4.8.7 The only criterion to be considered by the S/CRC in the "core curriculum needs of the institution", and the extent of the "impediments", is the extent to which education remains fairly stable. Therefore, all teachers should be given the opportunity of volunteering for transfer (para 4.7.4).

4.8.8 The formal written notification of their situation will be provided by the PIT to an education in excess following the validation of the recommendations of the S/CRC.

4.8.9 Any procedures with regard to the division of excess will be decided by the approved educators within 7 days of being declared in excess. (This process is explained in the Glossary, Annexure F1.)

4.8.10 It must be taken into account by S/CRCs that retirement of teachers, who have reached their retirement age, can be regarded as an impediment to the division of excess. (Para 4.4.3.5.)

5. The actions of the School Right-sizing Committee and the procedures relating to the identification of excess and vacancies may be directed to the personnel sections at each regional office, as well as to District Managers and Superintendents of Education.

E. PROCEEDURES TO BE FOLLOWED BY ALL SCHOOLS

1. Complete the form (S/4.1) which reflects the pupil numbers as they stand on 26 August 1996, the number of teaching spaces in the school and the number of posts currently on the school's teaching post establishment.

2. On this form, calculate the number of posts generated by the Interim Staffing Norm (Step 1) which is set out in Annexure F2.

3. Return the form by post or hand delivery to reach the address given below by no later than 16 September 1996.

Address for all correspondence relating to the right-sizing process:

THE CHAIRMAN
PROVINCIAL REDEPLOYMENT AGENCY
KWAZULU-NATAL DEPARTMENT OF EDUCATION AND CULTURE
PRIVATE BAG 9044
PIETERMARITZBURG
3200

4. It should be noted that the figures submitted will be regarded as the official and legal situation regarding the numbers of learners and educators in each school. The form requires the signature of the principal and the confirmation of the SJCRC to certify the accuracy of the figures supplied. (It is suggested that a similar form (which is not unexpected, in the near future.)

5. Within 10 days of receiving the documentation, the principal must establish a School Right-sizing Committee, immediately contact the District Manager of the district into which the school falls off for any reasons and advise the SJCRC. The principal must also sign the SJCRC case of a favourably staffed school, is to identify dispensable educators (see Forms G3a, b). However, please note the particular note at point 7.1.2.2 of page 7 of document F5.

6. In the case of schools falling into the category described in para 6, educators must be given the opportunity of volunteering for transfer (para 4.7.4).

7. Notice of meetings of the SJCRC must be supplied to the teachers' unions (see 4.5.6 and Annexure F7 for addresses).

8. Any recommendations made by the SJCRC must be given the opportunity of volunteering for transfer (para 4.7.4).

9. Once the SJCRC has reached its decisions, its final recommendations must be submitted within 30 days of the receipt of this circular. (There may be subsequent recommendations at the process outlined. Copies of all forms should be made and retained for future use.)

10. It should be remembered that, in the meantime, some educators may have submitted their applications for the voluntary severance package. Within 30 days of the receipt of this circular. (There may be subsequent recommendations at the process outlined. Copies of all forms should be made and retained for future use.)

11. In the event of any dispute, the SJCRC should have given consideration to whether such applications should be accepted as 'key personnel'.
Glossary of Terms

PIT: The Provincial Task Team
- A departmental committee comprising officials of the department and representatives of the teaching unions. It is the task of coordinating the "last in, first out" policy being endeavored by the province. It is also required to liaise with and attend both the Provincial Administrators and the Central Redeployment Agency regarding the allocation of educators in excess and their redeployment.

PRA: The Provincial Redeployment Agency
- This is a departmental committee in practice having been decided the PRA shall be a working group of the PRA and the Provincial Administrators. The PRA will liaise with the administrative, as represented by the professional, aspects of the redeployment exercise. These will include the evaluation of results and maintenance of data base and help in the redeployment of educators.

PTT: An Inter-Provincial Task Team (IPTT)
- An Inter-Provincial Task Team (IPTT) has been established to oversee the process in its national context.

S/CRC: School or College Right-sizing Committee
- The School/College Right-sizing Committee (S/CRC) is an approved plan by which the KwaZulu-Natal Department of Education would deal with the staff establishment.

SCH: The School/College RIGHT-SIZING COMMITTEE
- A negotiated and agreed plan by which the department and the relevant teacher unions would deal with the right-sizing exercise. These will include the establishment, as well as maintenance of data base, evaluation of results, and help in the redeployment of educators.

S/CRC: School/College Right-sizing Committee
- A representative of each section of the school's staff and which is a party to the ELRC as observer.

UFO: Unoccupied Post Establishment
- The total number of educator posts allocated to a school, regardless of their post level.

ELRC: The Education Labour Relations Council, a national body in which agreements between employer and employee parties are reached.

ELRC Chamber
- The provincial branch of the ELRC in KwaZulu-Natal Department Education and Culture and the various provincial teaching organisations reach agreement.

ELSEN: Learners with Special Education needs

School/College Right-sizing Committee (S/CRC):
- A committee to be formed at each school to deal with the right-sizing exercise. The school/college right-sizing committee is responsible for the approval of the school or college right-sizing committee.

School/College Right-sizing Committee (S/CRC):
- A negotiated and agreed plan by which the school's capacity to fulfill its curriculum obligations. By negotiation with the department, such persons may be retained for up to 12 months before being redeployed.

School/College Right-sizing Committee (S/CRC):
- A representative of each section of the school's staff and which is a party to the ELRC as observer.

Key Personnel
- Educators who have been granted the voluntary severance package, are included if the school's capacity to fulfill its curriculum obligations. By negotiation with the department, such persons may be retained for up to 12 months before being redeployed.

The right-sizing process shall end when there are no remaining educators in excess and, therefore, available for redeployment.

The PRA will report to the Central Redeployment Agency (CRA), which will oversee the right-sizing process when there are no remaining educators in excess.

The PRA will report to the Provincial Task Team (PTT), which will oversee the right-sizing process when there are no remaining educators in excess.

The PRA will report to the Central Redeployment Agency (CRA), which will oversee the right-sizing process when there are no remaining educators in excess.

The PIT shall be supported by a unit in the department, and the Provincial Administrators shall liaise with the administrative, as represented by the professional, aspects of the redeployment exercise. These will include the evaluation of results and maintenance of data base and help in the redeployment of educators.

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The post establishment of the school is calculated as follows:

1. The number of learners must be divided by the optimal class size for each phase;
2. A non-contact allocation to enable teachers to have non-contact or non-teaching time;
3. A management allocation for the management personnel;
4. An additional allocation for schools offering certain technical agricultural subjects and music as an examination subject.

The post establishment of the school is calculated as follows:

1. The number of learners must be divided by the optimal class size for each phase.
2. A basic allocation based on the number of learners and an optimal class size for each phase;
3. A management allocation to allow for the management of the school;
4. An additional allocation for schools offering certain technical agricultural subjects and music as an examination subject.

The annexure is applicable to all ordinary (mainstream) public and state-aided schools, excluding those occupied by management personnel.

It has four components, as follows:

1. The school, including those occupied by management personnel.
2. These schools will have to shed posts and, therefore, educators.
3. A basic allocation for the Basic Phase.
4. An extra allocation may also be applicable to schools which offer music as an examination subject, the pupils have to pass the subject successfully and also, that the examination facilities are available for individual tuition. This allocation is only included for schools where music is offered as an examination subject in the fourth phase.

2. Calculate the non-contact allocation by multiplying the basic allocation by 0.111 in the case of the secondary phase, and by 0.07 in the case of the senior primary phase. (There is no non-contact allocation for the JF Phase.)

3. The management allocation, for all schools, is 1.08% of the total basic allocation.

4. If the school falls into any of the following categories, an extra allocation is allowable:

   a. A technical school or an ordinary school offering technical subjects.
   b. A school where music is offered.
   c. A school offering Technical Theory and Workshop Practice, which is a third phase subject confined to schools offering technical subjects in the fourth phase.
   d. A school offering Technical Theory and Workshop Practice, which is a third phase subject confined to schools offering technical subjects in the fourth phase. The extra allocation for the Secondary phase will be 21.7 x 0.0078 x 0.111 = 0.17.

5. The management allocation, for all schools, is 1.08% of the total basic allocation.

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   a. A technical school or an ordinary school offering technical subjects.
   b. A school where music is offered.
   c. A school offering Technical Theory and Workshop Practice, which is a third phase subject confined to schools offering technical subjects in the fourth phase. The extra allocation for the Secondary phase will be 21.7 x 0.0078 x 0.111 = 0.17.

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   b. A school where music is offered.
   c. A school offering Technical Theory and Workshop Practice, which is a third phase subject confined to schools offering technical subjects in the fourth phase. The extra allocation for the Secondary phase will be 21.7 x 0.0078 x 0.111 = 0.17.
5. Schools with special/remedial/auditory hearing classes.

In terms of Resolution 9 of the ERGC, different categories of LSEN were allocated appropriate weightings so that they continue to benefit from the extra allocation of educators and significantly smaller classes.

The extra allocation is calculated according to the formula given below. Since educator posts allocated for this purpose should be used solely in pursuit of ELSEN, any fraction of a post in excess of 0.1 should be taken up to the next whole number.

The number of extra posts (the LSEN pupils who already been included in the pupil count) is determined by multiplying the number of LSEN posts who fall into each of the three categories by the factors indicated.

It should be noted that this procedure grants an additional allocation. For every 35 or 40 special class pupils, as the case may be, a post is granted in terms of the normal basic allocation of posts. Thus, there should be more dedicated special class/teacher indications than the number awarded in terms of the table below.

<table>
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<tr>
<th>CATEGORY</th>
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<th>SECONDARY</th>
<th>POINTS</th>
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<tr>
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<td>Partially hearing classes</td>
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</table>

**Note:**
1. The above table clearly shows who is in the minority who should be mentioned only, 41.6% of these promotion posts are commanded in 1997.
2. The selection about the posts at the above is not in order to count but a ratio of the normal number of posts to be used. This, in turn, ensures an equitable and the necessary capacity of the Department to advertise and to a large number of promotion posts.
3. The same rules are also applicable in the case of schools with special needs.
4. The above figures are for the purposes of illustration, rather than to be used as a basis for the determination of posts. In terms of the ERGC, the number of special class pupils, the excess posts will have to be considered for determination. They will be distributed to schools which fall short of the optimal norm in each of the above.
5. It should be noted that these figures are for purposes of illustration only. The results of the above table clearly show who is in the minority who should be mentioned only, 41.6% of these promotion posts are commanded in 1997.
The table below reflects the weightings agreed in ELRC Resolution 9/95. These provide the link between the post-provisioning norms (teacher:educator ratios) in mainstream schools and those which will have to be implemented in special schools and schools for specialised education. They are designed to provide LSEN with acceptable concessions in terms of class size.

The ratios given are to be seen as average ratios which should be attained across the province. Because of the complex nature of LSEN schools, and indeed this whole sector of education, the allocation of posts has required more attention than the staffing norm for mainstream schools. Thus, the process will be followed by another in due course which will specifically address the situation in schools for LSEN and the procedures to be followed with regard to the rationalisation programme.

In the meantime, they should form Right-Sizing Committees as called for in this circular in order to identify vacancies in terms of their existing post establishments which may result from natural attrition or the granting of the voluntary severance package. Schools which hold the opinion that they are unable to identify such vacancies in terms of their post establishment should request additional posts by identifying these as vacancies in Form 1. The identification of vacancies will be called for at a future date.

The table below reflects the weightings agreed in ELRC Resolution 9/95.

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<th>SEC FA</th>
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**GUIDELINES ON THE PROCEDURE MANUAL:**

**EXCESS EDUCATORS AND THE PROCESS OF REDEPLOYMENT**

This annexure should be read in conjunction with Parts B and C of the document. It offers elaboration on some of the points already covered and goes further explanation as to the process of redeployment.

1. The position of temporary teachers is covered in C, Para 5.

2. Applications for severance may now be submitted. The Application Form has already been supplied with Circular 5. Applications already submitted on the form provided with Circular 5 should stand. However, any teacher who has submitted an application in the form of Circular 5 by his/her school must make application on the prescribed form. Indeed, all applications must be made on the prescribed form.

The closing date for applications is 18 September 1996.

3. While any educator may apply for the severance package, it is the educator's right to be discharged by this means. The employer is empowered to discharge educators in the interest of efficiency and economy. (C/5.2.1)

4. It is the case of the PTT to recommend to the NEC which educators should be regarded as key personnel. Such recommendation should be made by the BCRG in the 6th instance. The application form is based on an annexure to Circular No. 5, (C/5.2.1, 2.3)

5. The educator identified as key personnel who, having successfully applied for severance, would be penalised by further serving six months during the 'extra' period of service up to 18 months, is provided for. He/she may be transferred to their new post levels (i.e., those agreed in Resolution 3/1996) before it can be decided which of them are 'competing' for the same post.

3. Excess Staff

1. The identification of excess is necessary. It follows, therefore, that the core curriculum needs of the school. The exercise may not be used to lay off auxiliary educators, nor those with an informal professional record. Should it be necessary for a school to take disciplinary action against an educator, the proper channel must be employed; the redeployment programme may not be used for this purpose. (C/5.2)

2. In the case of promotion post-holders and where identification of excess is necessary, educators will be transferred to their new post levels (i.e., those agreed in Resolution 3/1996) before it can be decided which of them are "competing" for the same post.

Furthermore, where two former post levels have been combined into one new post level (e.g., the previous post levels 3 and 4), the total period of service in both of the previous levels shall be regarded as the service period on the new level. (C/5.2 para 1)
### ADDRESSES OF TEACHERS' UNIONS

**SAOFE:** Association of South African Educators

**Contact Person:** Mr D van der Heyden (Secretary)  
**Postal Address:** P.O. Box 409  
**Amstelands 4125**  
**Durban**  
**Telephone:** 031-2033258  
**Fax:** 031-9033258

**APEK:** Association of Professional Educators KwaZulu Natal  
**Contact Person:** Mr G Molyneux (1st Executive Officer)  
**Postal Address:** P.O. Box 208  
**Durban**  
**Telephone:** 031-544641  
**Fax:** 031-544641

**NATU:** Natal Afrikaanse Onderwysers Unie  
**Contact Person:** Mr H R (President)  
**Postal Address:** P.O. Box 1742  
**Durban**  
**Telephone:** 031-252200  
**Fax:** 031-252200

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### GUIDELINES TO THE COMPLETION OF THE FORMS (G1 - G3b)

#### FORM G1

1. **INFORMATION REGARDING THE NAME AND LOCATION OF THE SCHOOL**
   a. The PERSAL number is a five-digit number to be found at the head of the pay slip for the school.
   b. Give the full title of the school, and use HS, PS, LPS, GSH, etc., to denote the type of school.
   c. This is the postal address for the school.
   d. Identify the departmental region into which the school falls according to the current (new) demarcation and the regional district in which it is located. (Use the regional abbreviations: PSH (Port Shepstone), CBS (Cape Town), DAV (Durban), DSTN (Durban Shining), GRN (Grenfell), HCS (Hermanus), LSP (Ladysmith), PMO (Pomfret), JHB (Johannesburg), PMB (Pietermaritzburg), LPS (Plettenberg), WY (Wynberg).
   e. Provide code number and contact person. Available.

2. **INFORMATION REGARDING PUPIL NUMBERS AND CLASSROOMS**
   a. Indicate the lowest and highest grades accommodated in the school.
   b. This part of the table must account for all pupils in the school except those accommodated in special or remedial classes (grade 9 or above). Those in special or remedial classes are to be included in this count. Schools which take in more than one phase, as described in the table, must include numbers for each of the phases accommodated in the school.
   c. The name of the school is determined by the school board.
   d. A primary school which does not cater for pupils in grade 9 or above may be included. The number of pupils in grade 9 or above must be included only if the school caters for grade 9 or above. If the school caters for grade 9 or above, it should be staffed by an educator whose post is included in the official post establishment and the number must be included in the table. (The reference to the table must be included only if the school caters for grade 9 or above)
   e. This is the postal address of the school.
   f. The number of pupils in grade 9 or above should be included. They should have been included in the number given in Paragraph (a).
   g. The number of pupils in grade 9 or above should be included. They should have been included in the number given in Paragraph (a).
   h. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   i. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   j. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   k. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   l. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   m. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   n. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   o. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   p. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   q. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   r. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   s. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   t. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   u. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   v. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   w. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   x. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   y. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.
   z. If a school caters for grade 9 or above, it must be included only if the school caters for grade 9 or above.

3. **POST ESTABLISHMENT**
   a. This must reflect only the official number of educators which have actually been established at the school. The number may differ from the number of educators on the post-hold. Educators who have been established will have a staff establishment of 0.
   b. This number should only reflect the number of positions actually established in the school at the present time. A post holder, who is not functioning as a member of the school staff, must be included. Thus, the number may exceed the number in all other categories which appear in the school, or be less than all for the event of their being non-functioning personnel who have, for example, been retained on the establishment.
   c. It is important to mention how to calculate the post establishment in terms of the interim staffing norms contained in Annexure 12.

#### FORM G2b

- The post establishment should reflect the number of positions actually occupied. If there are more positions occupied than the post establishment, the difference should be explained.
2. It is thought that the most common reason for an educator being identified as excess have been listed. However, there are numerous other possibilities and if the reason is not included in the list, it is requested that the information be form filled in an 'educational statement.' It is expected that a reason is stated in order for the PIT to inform the educator accurately.

FORM G2a

1. Should the excess educator wish to bring any other factor within the knowledge of the PIT, they are welcome to submit an accompanying document.

2. This will not be taken as a reason for non-transferrability. If an excess educator has been non-transferable and has been notified, they are welcome to submit their reason(s) in order to be considered for non-transferability. This will only be received after the PIT has formally notified the excess educator that their non-transferability has been notified. Such information will have to be clearly stated and supported by accompanying documentation.

FORM G3a

1. This form is a summary of the posts which a school wishes to request from the 'excess' vacancy list.

2. All schools must have vacancies to be considered. If a school wishes to request a post, the PIT will not be able to consider their request until the PIT has formally notified the excess educator that their non-transferability has been notified.

3. The posts listed should be stated in correct hierarchy and order. The PIT will not consider other forms, which is a comprehensive description of each interested role.

FORM G2b

1. This form should be submitted for each post listed.

2. Describe as fully as possible, the role of each post listed.

3. Extra information may be submitted in a supplement to this form.

4. The questions relating to the number of excess educators are answered. It is requested that additional information as this can be quickly input into the system. However, it is expected that all relevant information is submitted. This is particularly important for any educators who wish to be considered for non-transferability.
1.6 Applications for educators in excess to be declared non-transferable

1.7 The ranking shall reflect the following priorities:

- those who have volunteered for redeployment
- the most senior educator

2.1 The agreed-upon post-provisioning scale is that whereby up to the level of 1397. Thus, only up to this level of staffing may posts be created and permanently filled. Such posts may only be established by the Department, subject to prior written notice. (C/8.6)

3.4 Applications for educators in excess to be declared non-transferable should be submitted to the PTT within 7 days of the educator receiving written notice of the intention to excess. (F/6) Written notice will be provided by the PTT.

4.1 The PRA and PTT will maintain a Redeployment Register. This will confirm the names of those educators who have volunteered for redeployment as well as those who have been declared to be in excess. The register will include relevant details about the educators concerned.

4.2 The PRA and PTT will maintain a Redeployment Register. This will confirm the names of those educators who have volunteered for redeployment as well as those who have been declared to be in excess. The register will include relevant details about the educators concerned.

4.3 At the same time, the PRA and PTT will maintain a Redeployment Register. This will confirm the names of those educators who have volunteered for redeployment as well as those who have been declared to be in excess. The register will include relevant details about the educators concerned.

4.4 The PRA and PTT will maintain a Redeployment Register. This will confirm the names of those educators who have volunteered for redeployment as well as those who have been declared to be in excess. The register will include relevant details about the educators concerned.

4.5 The PRA and PTT will maintain a Redeployment Register. This will confirm the names of those educators who have volunteered for redeployment as well as those who have been declared to be in excess. The register will include relevant details about the educators concerned.

4.6 The PRA and PTT will maintain a Redeployment Register. This will confirm the names of those educators who have volunteered for redeployment as well as those who have been declared to be in excess. The register will include relevant details about the educators concerned.

4.7 The PRA and PTT will maintain a Redeployment Register. This will confirm the names of those educators who have volunteered for redeployment as well as those who have been declared to be in excess. The register will include relevant details about the educators concerned.

5.1 The agreed-upon post-provisioning scale is that agreed at a national level, and is 40 and 35 in the year 2000. In KwaZulu-Natal, the agreed norm is 40 and 40 for Primary and Secondary school respectively for 1996 and 1997. Thus, only up to this level of staffing may posts be created and permanently filled. Such posts may only be established by the Department, subject to prior written notice. (C/8.6)

6.2 The PRA and PTT will maintain a Redeployment Register. This will confirm the names of those educators who have volunteered for redeployment as well as those who have been declared to be in excess. The register will include relevant details about the educators concerned.

8.3 The name of the recommended educator will be submitted to the PTT for the consideration of the governing body.

9.1 The governing body, i.e., the governance structure which is functional at the receiving institution, has the right to reject the recommended candidate, but must supply a full written explanation as to why the educator is unaccountable. If the resolution is successful, the PTT will make a further recommendation.
APPENDIX TWO

Questionnaire
INSTRUCTIONS

Please answer each question with YES or NO (Tick your answer).

Please remember that questions refer to the immediate past or the recent period of your life.

When answering each question, think about the recent past.

Have you recently:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Been able to concentrate on whatever you’re doing?</td>
</tr>
<tr>
<td>2.</td>
<td>Lost much sleep over worry?</td>
</tr>
<tr>
<td>3.</td>
<td>Been having restless, disturbed nights?</td>
</tr>
<tr>
<td>4.</td>
<td>Been managing to keep yourself busy and occupied?</td>
</tr>
<tr>
<td>5.</td>
<td>Been getting out of the house as much as usual?</td>
</tr>
<tr>
<td>6.</td>
<td>Been managing as well as most people would in your shoes?</td>
</tr>
<tr>
<td>7.</td>
<td>Felt on the whole you were doing things well?</td>
</tr>
<tr>
<td>8.</td>
<td>Been satisfied with the way you’ve carried out your task?</td>
</tr>
<tr>
<td>9.</td>
<td>Been able to feel warmth and affection for those near to you?</td>
</tr>
<tr>
<td>10.</td>
<td>Been finding it easy to get on with other people?</td>
</tr>
<tr>
<td>11.</td>
<td>Spent much time chatting with people?</td>
</tr>
<tr>
<td>12.</td>
<td>Felt that you are playing a useful part in things?</td>
</tr>
<tr>
<td>13.</td>
<td>Felt capable of making decisions about things?</td>
</tr>
<tr>
<td>14.</td>
<td>Felt constantly under strain?</td>
</tr>
<tr>
<td>15.</td>
<td>Felt you couldn’t overcome your difficulties?</td>
</tr>
</tbody>
</table>
2.  

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>16. Been finding life a struggle all the time?</td>
<td>[</td>
</tr>
<tr>
<td>17. Been able to enjoy your normal day-to-day activities?</td>
<td>[</td>
</tr>
<tr>
<td>18. Been taking things hard?</td>
<td>[</td>
</tr>
<tr>
<td>19. Been getting scared or panicky for no good reason?</td>
<td>[</td>
</tr>
<tr>
<td>20. Been able to face up to your problems?</td>
<td>[</td>
</tr>
<tr>
<td>21. Found everything getting on top of you?</td>
<td>[</td>
</tr>
<tr>
<td>22. Been feeling unhappy and depressed?</td>
<td>[</td>
</tr>
<tr>
<td>23. Been losing confidence in yourself?</td>
<td>[</td>
</tr>
<tr>
<td>24. Been thinking of yourself as a worthless person?</td>
<td>[</td>
</tr>
<tr>
<td>25. Felt that life is entirely hopeless?</td>
<td>[</td>
</tr>
<tr>
<td>26. Been feeling hopeful about your own future?</td>
<td>[</td>
</tr>
<tr>
<td>27. Been feeling reasonably happy, all things considered?</td>
<td>[</td>
</tr>
<tr>
<td>28. Been feeling nervous and strung up all the time?</td>
<td>[</td>
</tr>
<tr>
<td>29. Felt that life isn’t worth living?</td>
<td>[</td>
</tr>
<tr>
<td>30. Found at times you couldn’t do anything because your nerves were too bad?</td>
<td>[</td>
</tr>
</tbody>
</table>
### EDUCATORS SURVEY

<table>
<thead>
<tr>
<th>HOW OFTEN</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Never</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A few times a year or less</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Once a month or less</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A few times a month</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Once a week</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A few times week</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Every day</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**HOW OFTEN**

0 - 6 Statements:

1. ________ I feel emotionally drained from my work.
2. ________ I feel used up at the end of the work day.
3. ________ I feel fatigued when I get up in the morning and have to face another day on the job.
4. ________ I can easily understand how my students feel about things.
5. ________ I feel I treat some students as if they were impersonal objects.
6. ________ Working with people all day is really a strain for me.
7. ________ I deal very effectively with the problems of my students.
8. ________ I feel burned out from my work.
9. ________ I feel I’m positively influencing other people’s lives through my work.
10. ________ I’ve become more callous toward people since I took this job.
11. ________ I worry that this job is hardening me emotionally.
12. ________ I feel very energetic.
13. ________ I feel frustrated by my job.
14. ________ I feel I’m working too hard on my job.
<table>
<thead>
<tr>
<th>HOW OFTEN</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Never</td>
<td>A few times a year or less</td>
<td>Once a month or less</td>
<td>A few times a month</td>
<td>Once a week</td>
<td>A few times week</td>
<td>Every day</td>
</tr>
</tbody>
</table>

15. I don’t really care what happens to some students.

16. Working with people directly puts too much stress on me.

17. I can easily create a relaxed atmosphere with my students.

18. I feel exhilarated after working closely with my students.

19. I have accomplished many worthwhile things in this job.

20. I feel like I’m at the end of my tether.

21. In my work, I deal with emotional problems very calmly.

22. I feel students blame me for some of their problems.

(Administrative use only)  cat  cat  cat  cat  cat

EE: __________  DP: __________  PA: __________
1. Age

- 20 - 30
- 31 - 40
- 41 - 45

2. Gender

- Male
- Female

3. Post

- Management
- Teacher

4. I am concerned about the issues around redundancy and right sizing of schools.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
</table>

5. Concerns about redundancy and right sizing have made me feel more stressed than usual.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
</table>

6. All this talk about redundancy has not affected my health.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
</table>

7. I was just as effective as a teacher before the issue of redundancy was raised.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
</table>

8. If my financial security is assured, in terms of a package, I would not mind leaving my job.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
</table>
9. I am reluctant to give up teaching at this stage.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
</table>

10. If necessary I will be willing to move to another part of the province in order to continue teaching.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
</table>

11. I am reluctant to leave the area in which I am teaching.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
</table>

12. The uncertainty about my career as a teacher has

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........................................................................................................................................
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APPENDIX THREE

Department of Education - Health Questionnaire
GESONDHEIDVRAELEYS
HEALTH QUESTIONNAIRE

THIS FORM MUST BE COMPLETED BY CANDIDATES FOR PERMANENT APPOINTMENT IN THE PUBLIC SERVICE

A

1. Van (in block letters)
Surname (in block letters)

2. Voornam
First Names

3. Ouderdom
Age

4. Lengte
Height

5. Liggaamsmassa
Body mass

B:

1. Is u suksesvol ingeent?
Have you been successfully vaccinated?

Ja
Yes

Nee
No

2. Enige velsiekte?
Any skin disease?

Ja
Yes

Nee
No

3. Enige aandoening van die beenstelsel en/of gewrigte?
Any affection of the skeleton and/or joints?

Ja
Yes

Nee
No

4. Enige aandoening van die oor, ore, neus of siede?
Any affection of the ears, nose or teeth?

Ja
Yes

Nee
No

5. Enige aandoening van die hart of bloedomloopstelsel?
Any affection of the heart or circulatory system?

Ja
Yes

Nee
No

6. Enige aandoening van die bors of asemballingstelsel?
Any affection of the chest or respiratory system?

Ja
Yes

Nee
No

7. Enige aandoening van die spysverteringstelsel?
Any affection of the digestive system?

Ja
Yes

Nee
No
**LY U. OF HET U AL OOT GELY AAN—**

**ARE YOU SUFFERING OR HAVE YOU EVER SUFFERED FROM—**

<table>
<thead>
<tr>
<th></th>
<th>Ja—Yes</th>
<th>Nee—No</th>
</tr>
</thead>
<tbody>
<tr>
<td>8. Enige aandoening van die尿inere stelsel en of geslagsorgane? Any affection of the urinary system and or genital organs?</td>
<td>Ja—Yes</td>
<td>Nee—No</td>
</tr>
<tr>
<td>9. Enige tenuwee-aandoening of geestes afwyking? Any nervous affection or mental abnormality?</td>
<td>Ja—Yes</td>
<td>Nee—No</td>
</tr>
<tr>
<td>10. Enige ander siekte? Any other illnesses?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**GEE BESONDERHEDEN VAN DIE AARD EN GRAAD VAN DIE GEBREK**

Give details of the nature and severity of the disability.

---

**1. Het u enige gehoor-, spraak- of gesigsgebrek?**

Do you suffer from any defect of hearing, speech or sight?

**Ja—Yes**

---

**2. Is u liggaamlik gestrem en maak u gebruik van kunsledemate?**

Are you physically disable and do you use artificial limbs?

**Ja—Yes**

---

**I. Het u oor enige operasie(s) ondergaan?**

Have you undergone any operation(s)?

**Ja—Yes**

---

**EK VERKLAR DAT DIE INLIGTING HIERRO WAAR EN JUUS IS EN DAT EK GEEN INLIGTING OOR MY GESONDHEIDTOESTAND VERWYG HET NIE. I declare that the above information is true and correct and that I have not withheld any information regarding my health.**

**Handtekening—Signature**

---

**Datum—Date**
APPENDIX FOUR

Request for permission to undertake research.
APPLICATION FOR PERMISSION TO UNDERTAKE RESEARCH IN SCHOOLS IN THE PIETERMARITZBURG REGION

I am a student at the University of Natal Pietermaritzburg and I am studying for a Master’s Degree in Educational Psychology. I am interested in undertaking research in some of the schools in the Pietermaritzburg area.

The aim of the study is to establish the health status of a group of teachers during a time of re-organisation in education. All work undertaken at schools will be outside of instruction time and the pupils will not be affected. The following instruments will be used to gather data:

1. The General Health Questionnaire.
2. The Maslach Inventory.

The time of administration will be arranged to suit the principals of the schools concerned. It is anticipated that the principals will allow for a 15 minute time slot during a staff meeting. The teachers will be briefed on the purpose of the research and instructed on how to complete the questionnaire. Teachers will be asked to participate on an anonymous basis and will, of course, be free to decline.

Permission is hereby sought to approach the principals of 5 local Secondary schools in order to ask for their cooperation in undertaking this project:

1. Woodlands Secondary
2. Esther Payne Smith Secondary
3. Kharina Secondary
4. Heather Secondary
5. Northbury Secondary

A copy of the research will be forwarded to you on completion. I shall be grateful if you will inform me whether I may proceed with this research.

Thank You

M. JEEVA [MS]

SUPERVISOR

The University of Natal is an equal opportunities, affirmative action University.
APPENDIX FIVE

Demographic Data for the three calibration groups (Goldberg, 1972). p.114.
## DEMOGRAPHIC DATA FOR THE THREE CALIBRATION GROUPS

### SEX:

<table>
<thead>
<tr>
<th></th>
<th>Females</th>
<th>Males</th>
</tr>
</thead>
<tbody>
<tr>
<td>Severely ill</td>
<td>52</td>
<td>48</td>
</tr>
<tr>
<td>Mildly ill</td>
<td>49</td>
<td>51</td>
</tr>
<tr>
<td>Mean of ill groups</td>
<td>50</td>
<td>49</td>
</tr>
<tr>
<td>Normals</td>
<td>51</td>
<td>49</td>
</tr>
</tbody>
</table>

### SOCIAL CLASS:

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>Unclassifiable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Severely ill</td>
<td>0</td>
<td>18</td>
<td>46</td>
<td>9</td>
<td>17</td>
<td>10</td>
</tr>
<tr>
<td>Mildly ill</td>
<td>2</td>
<td>21</td>
<td>57</td>
<td>6</td>
<td>3</td>
<td>11</td>
</tr>
<tr>
<td>Mean of ill groups</td>
<td>1</td>
<td>19</td>
<td>51</td>
<td>7</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Normals</td>
<td>5</td>
<td>27</td>
<td>46</td>
<td>8</td>
<td>7</td>
<td>7</td>
</tr>
</tbody>
</table>

### AGE:

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<tr>
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<th>30-39</th>
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<th>50-59</th>
<th>60-69</th>
<th>70+</th>
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<tbody>
<tr>
<td>Severely ill</td>
<td>1</td>
<td>31</td>
<td>28</td>
<td>31</td>
<td>12</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>Mildly ill</td>
<td>10</td>
<td>18</td>
<td>32</td>
<td>24</td>
<td>12</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Mean of ill groups</td>
<td>5</td>
<td>24</td>
<td>30</td>
<td>24</td>
<td>12</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>Normals</td>
<td>5</td>
<td>23</td>
<td>26</td>
<td>25</td>
<td>13</td>
<td>7</td>
<td>7</td>
</tr>
</tbody>
</table>

*Distribution in percentage*  
\[ n = 115 \]
APPENDIX SIX

Normative Data on the GHQ Study (Goldberg, 1972) p 141.
NORMATIVE DATA SHOWING VARIATION IN GHQ SCORE BY SEX, RACE, AGE, SOCIAL CLASS AND MARITAL STATUS

<table>
<thead>
<tr>
<th>SEX</th>
<th>60-ITEM GHQ—LONDON</th>
<th>30-ITEM GHQ—PHILADELPHIA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n</td>
<td>mean</td>
</tr>
<tr>
<td>Males</td>
<td>203</td>
<td>7.73</td>
</tr>
<tr>
<td>Females</td>
<td>350</td>
<td>10.41</td>
</tr>
</tbody>
</table>

- (t = 2.77, p < 0.01)
- (t = 3.28, p < 0.01)

<table>
<thead>
<tr>
<th>RACE</th>
<th>30-ITEM GHQ—PHILADELPHIA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n</td>
</tr>
<tr>
<td>White</td>
<td>569</td>
</tr>
<tr>
<td>Black</td>
<td>339</td>
</tr>
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</table>

- (t = 2.46, p < 0.05)

<table>
<thead>
<tr>
<th>AGE</th>
<th>60-ITEM GHQ—LONDON</th>
<th>30-ITEM GHQ—PHILADELPHIA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n</td>
<td>mean</td>
</tr>
<tr>
<td>15-24</td>
<td>108</td>
<td>9.64</td>
</tr>
<tr>
<td>25-34</td>
<td>110</td>
<td>9.04</td>
</tr>
<tr>
<td>35-44</td>
<td>143</td>
<td>9.64</td>
</tr>
<tr>
<td>45-54</td>
<td>100</td>
<td>10.98</td>
</tr>
<tr>
<td>55-64</td>
<td>63</td>
<td>8.64</td>
</tr>
<tr>
<td>65-74</td>
<td>30</td>
<td>5.63</td>
</tr>
</tbody>
</table>

- (Analysis of variance F = 1.22 on 5; 547 df, Not significant)
- (Analysis of variance F = 2.00 on 5; 900 df, Not significant)

<table>
<thead>
<tr>
<th>MARITAL STATUS</th>
<th>60-ITEM GHQ—LONDON</th>
<th>30-ITEM GHQ—PHILADELPHIA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n</td>
<td>mean</td>
</tr>
<tr>
<td>Single</td>
<td>(9)</td>
<td>(8.47)</td>
</tr>
<tr>
<td>Engaged</td>
<td>21</td>
<td>14.10</td>
</tr>
<tr>
<td>Married</td>
<td>103</td>
<td>14.20</td>
</tr>
<tr>
<td>Separated</td>
<td>25</td>
<td>17.80</td>
</tr>
<tr>
<td>Divorced</td>
<td>25</td>
<td>11.58</td>
</tr>
<tr>
<td>Widowed</td>
<td>52</td>
<td>11.58</td>
</tr>
</tbody>
</table>

- (Between a and b; t = 2.06, p < 0.05)
- c and d; t = 3.66, p < 0.01
- d and c; t = 3.00, p < 0.01
- e and f; t = 2.42, p < 0.05
APPENDIX SEVEN

Demographic Data for MBI Study Maslach and Jackson, 1986, p34
## Demographic Norms for the MBI Subscales

<table>
<thead>
<tr>
<th>Variable</th>
<th>N</th>
<th>M</th>
<th>SD</th>
<th>M</th>
<th>SD</th>
<th>M</th>
<th>SD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Emotional</strong></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td><strong>Exhaustion</strong></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td><strong>Depersonalization</strong></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Personal</strong></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Accomplishment</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Sex</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>2,247</td>
<td>19.86</td>
<td>10.47</td>
<td>7.43</td>
<td>5.99</td>
<td>36.29</td>
<td>6.76</td>
</tr>
<tr>
<td>Female</td>
<td>3,421</td>
<td>20.99</td>
<td>10.66</td>
<td>7.02</td>
<td>6.34</td>
<td>36.50</td>
<td>6.56</td>
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<tr>
<td><strong>Race</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caucasian</td>
<td>1,511</td>
<td>23.14</td>
<td>11.39</td>
<td>8.86</td>
<td>6.38</td>
<td>37.12</td>
<td>6.85</td>
</tr>
<tr>
<td>Black</td>
<td>1,099</td>
<td>17.80</td>
<td>10.53</td>
<td>5.19</td>
<td>5.01</td>
<td>37.62</td>
<td>7.10</td>
</tr>
<tr>
<td>Asian-American</td>
<td>312</td>
<td>23.03</td>
<td>13.61</td>
<td>10.58</td>
<td>7.96</td>
<td>34.75</td>
<td>7.78</td>
</tr>
<tr>
<td>Other</td>
<td>53</td>
<td>19.92</td>
<td>10.83</td>
<td>8.11</td>
<td>5.71</td>
<td>36.17</td>
<td>7.99</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>30 and under</td>
<td>1,044</td>
<td>23.86</td>
<td>11.23</td>
<td>9.36</td>
<td>9.06</td>
<td>35.91</td>
<td>6.58</td>
</tr>
<tr>
<td>31-40</td>
<td>1,187</td>
<td>22.26</td>
<td>10.78</td>
<td>8.25</td>
<td>6.05</td>
<td>37.26</td>
<td>6.63</td>
</tr>
<tr>
<td>41-50</td>
<td>641</td>
<td>20.24</td>
<td>11.06</td>
<td>6.66</td>
<td>5.56</td>
<td>38.19</td>
<td>7.67</td>
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<tr>
<td>51 and over</td>
<td>624</td>
<td>17.96</td>
<td>10.93</td>
<td>5.29</td>
<td>5.09</td>
<td>38.41</td>
<td>7.90</td>
</tr>
<tr>
<td><strong>Marital Status</strong></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single</td>
<td>732</td>
<td>24.28</td>
<td>11.19</td>
<td>9.35</td>
<td>6.43</td>
<td>35.89</td>
<td>6.71</td>
</tr>
<tr>
<td>Married</td>
<td>2,017</td>
<td>19.95</td>
<td>10.63</td>
<td>7.04</td>
<td>6.02</td>
<td>38.04</td>
<td>6.74</td>
</tr>
<tr>
<td>Divorced</td>
<td>478</td>
<td>22.29</td>
<td>11.19</td>
<td>7.73</td>
<td>5.97</td>
<td>37.22</td>
<td>6.73</td>
</tr>
<tr>
<td>Other</td>
<td>251</td>
<td>23.01</td>
<td>12.36</td>
<td>7.34</td>
<td>6.43</td>
<td>37.30</td>
<td>7.01</td>
</tr>
<tr>
<td><strong>Education</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>No College</td>
<td>269</td>
<td>22.99</td>
<td>11.77</td>
<td>8.57</td>
<td>6.86</td>
<td>36.54</td>
<td>6.97</td>
</tr>
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<td>Some College</td>
<td>664</td>
<td>21.52</td>
<td>11.29</td>
<td>8.00</td>
<td>6.54</td>
<td>35.33</td>
<td>6.66</td>
</tr>
<tr>
<td>Compl. College</td>
<td>664</td>
<td>19.08</td>
<td>9.97</td>
<td>7.49</td>
<td>5.70</td>
<td>31.48</td>
<td>6.95</td>
</tr>
<tr>
<td>Postgrad Work</td>
<td>1,873</td>
<td>23.13</td>
<td>10.74</td>
<td>7.35</td>
<td>5.67</td>
<td>37.88</td>
<td>6.42</td>
</tr>
</tbody>
</table>

*Note:* See Table 1 for occupations represented in samples.
APPENDIX EIGHT

Reliability and validity coefficients on the two scoring methods of the GHO
Reliability and validity coefficients, and data relevant to case identification, for progressively shorter versions of the questionnaire using the GHQ scoring method, and showing the effects of using the Likert scoring method for the 60-item version of the questionnaire.

<table>
<thead>
<tr>
<th>GHQ Score</th>
<th>Test-retest (Frs.)</th>
<th>Test-retest (Drs.)</th>
<th>Split-half</th>
<th>GH</th>
<th>ST</th>
<th>Overall Misclassification Rate</th>
<th>Sensitivity</th>
<th>Specificity</th>
</tr>
</thead>
<tbody>
<tr>
<td>60 Items</td>
<td>0.75</td>
<td>0.51</td>
<td>0.95</td>
<td>0.80</td>
<td>0.77</td>
<td>11/12</td>
<td>8.5</td>
<td>10.9</td>
</tr>
<tr>
<td>36 Items</td>
<td>0.75</td>
<td>0.50</td>
<td>0.94</td>
<td>0.79</td>
<td>0.77</td>
<td>6.7</td>
<td>12.5</td>
<td>9.8</td>
</tr>
<tr>
<td>30 Items</td>
<td>0.76</td>
<td>0.54</td>
<td>0.90</td>
<td>0.81</td>
<td>0.70</td>
<td>7.8</td>
<td>10.0</td>
<td>13.1</td>
</tr>
<tr>
<td>20 Items</td>
<td>0.75</td>
<td>0.52</td>
<td>0.93</td>
<td>0.78</td>
<td>0.74</td>
<td>4.5</td>
<td>12.0</td>
<td>13.2</td>
</tr>
<tr>
<td>12 Items</td>
<td>0.77</td>
<td>0.53</td>
<td>0.92</td>
<td>0.80</td>
<td>0.72</td>
<td>4.5</td>
<td>11.0</td>
<td>14.3</td>
</tr>
<tr>
<td>6 Items</td>
<td>0.73</td>
<td>0.59</td>
<td>0.96</td>
<td>0.77</td>
<td>0.71</td>
<td>3.5</td>
<td>13.0</td>
<td>14.3</td>
</tr>
<tr>
<td>3 Items</td>
<td>0.73</td>
<td>0.53</td>
<td>0.89</td>
<td>0.77</td>
<td>0.72</td>
<td>1.2</td>
<td>14.5</td>
<td>12.1</td>
</tr>
</tbody>
</table>

Likert Scoring

<table>
<thead>
<tr>
<th>GHQ Score</th>
<th>Test-retest (Frs.)</th>
<th>Test-retest (Drs.)</th>
<th>Split-half</th>
<th>GH</th>
<th>ST</th>
</tr>
</thead>
<tbody>
<tr>
<td>60 Items</td>
<td>0.75</td>
<td>0.58</td>
<td>0.96</td>
<td>0.78</td>
<td>0.76</td>
</tr>
</tbody>
</table>

GHQ: General Health Questionnaire
Frs.: Forward
Drs.: Backward
GH: GHQ
ST: Test
GP: General Practice
STH: Standardised Threshold