

**How Does Globalisation Affect the Professional  
Lives and Work of Office-Based Educators? A  
Case Study of Pinetown District Office in  
KwaZulu-Natal**

By

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## DECLARATION

I, **Thulani Clement Ngubane**, hereby declare that the work presented in this dissertation is my own, and that reference to the work of others has been duly acknowledged.

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Student's signature

Date

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Supervisors signatures

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Date

## DEDICATION

I dedicate this dissertation to:

My parents:

**Jeremiah and Beatrice Ngubane** for providing support, motivation and enthusiasm throughout my schooling and tertiary education and

My family:

My supportive wife, **Ntokozo**, for moral and spiritual support and for taking excellent care of our two sons, **Sihle** and **Sibusiso**, during my studies. Many thanks also to my brother, **Musa**, and my sisters, **Khanyi, Dudu, Thembi, Thandi**, and a special tribute to my late sister **Dumi**, for being my source of inspiration and my friends and colleagues:

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## LIST OF ABBREVIATIONS

<b>INSET:</b>	In-service Education and Training
<b>EMD:</b>	Education Management Development
<b>IQMS:</b>	Integrated Quality Management Systems
<b>DA:</b>	Developmental Appraisal
<b>PM:</b>	Performance Measurement
<b>WSE:</b>	Whole School Evaluation
<b>ELRC:</b>	Learner Representative Council
<b>WTO:</b>	World Trade Organisation
<b>IMF:</b>	International Monetary Fund
<b>UNESCO:</b>	United Nations Educational, Scientific, and Cultural Organisation
<b>RDP:</b>	Re-construction and Development Programme
<b>OBE:</b>	Outcomes-Based Education
<b>OECD:</b>	Organisation for Economic Cooperation and Development
<b>NQF:</b>	National Qualification Framework
<b>C2005:</b>	Curriculum 2005
<b>CTA:</b>	Common Task Assessment
<b>GEAR:</b>	Growth Equity and Redistribution
<b>IQMS:</b>	Quality Management System
<b>SASA:</b>	South Africa Schools Act
<b>SGB:</b>	School Governing Body

<b>ESSRC:</b>	Economic and Social Science Research Council
<b>DET:</b>	Department of Education and Training
<b>FET:</b>	Further Education and Training
<b>NGO:</b>	Non governmental organisations
<b>GET:</b>	General Education and Training
<b>DCES:</b>	Deputy Chief Education Specialist
<b>SMT:</b>	School Management Teams
<b>CASS:</b>	Continuous Assessment
<b>FES:</b>	First Education Specialist
<b>LA:</b>	Learning Area
<b>HOD:</b>	Head of Department
<b>CES:</b>	Chief Education Specialist
<b>NCS:</b>	National Curriculum Statement
<b>EMS:</b>	Economic Management Science
<b>HOD:</b>	House of Delegates
<b>HOR:</b>	House of Representatives
<b>NED:</b>	National Education Department
<b>SACE:</b>	South African Council of Educators
<b>SAQA:</b>	South African Qualifications Authority
<b>SETA:</b>	Sector Education and Training Authority
<b>SGB:</b>	Standards Generating Body
<b>SGB:</b>	School Governing Body
<b>TLS:</b>	Teaching and Learning Services

## **ABSTRACT**

The purpose of this study was to investigate the impact that globalisation has on the professional roles and work of the office-based educators (subject advisors). It was conducted as a case study in one of the districts at EtheKwini region. It involved eleven advisors that belong to the Teaching and Learning Support (TLS) section. As a theoretical foundation, I used critical theory as a lens to examine the neo-liberal agenda that globalisation has imposed upon South Africa's new education system, particularly the impact on the role of subject advisors.

The research was conducted within a qualitative approach and took the form of a case study. The data collection techniques included a questionnaire and an in-depth semi structured focus group interview. The data collected was analysed using thematic analysis to identify codes, categories and themes. These were not defined prior to analysis, but emerged during analysis.

The findings revealed that advisors are frustrated by the roles that they are expected to perform. They find themselves giving less professional support to educators and spending more time administering monitoring tools to schools. The feeling is that they are de-professionalised because they no longer work as subject specialists most of the time.

Finally, recommendations and limitations of this study are discussed.

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## CHAPTER ONE

### 1.1 INTRODUCTION

The key focus for this research was on the way in which globalisation processes affect the work of office-based educators in South Africa. The key site for the investigation was the Pinetown District Office in KwaZulu-Natal province, South Africa. My unit of study is the office-based educators who work as subject advisors to support schools in curriculum development and implementation. Within the African context, in general, and South Africa in particular, there is a growing sense of optimism about the potential of Africa to enjoy material progress in the twenty-first century, something that marks a sense of the re-birth, commonly understood as renaissance, of the African continent.

The notion of African renaissance promoted by the former South African president, Mr Thabo Mbeki is, understandably, spreading throughout the continent. This illustrates the degree of optimism among African leaders. The impact of such optimism, furthermore, manifests through perceptions in development circles outside the continent that there are a number of positive political and economic examples to be found within Africa. These include such countries as Botswana, Uganda and Ghana. The discipline of economics has also been reached by this positive attitude towards Africa so much that papers and reports have begun to consider the evidence for an economic revival in all parts of the African continent (MacGrath 2002).

For MacGrath (2002), however, the evidence for African economic growth was limited in terms of its extent and likely sustainability. For him, the most pressing challenge is the impact of globalisation and its related trends. There is a clear danger, for example, that globalisation will turn the economic balance of power further in favour of those countries that are already wealthy. Increasing competition in global and domestic markets, furthermore, would seem to be the most damaging factor for Africa which seems to be presently the least competitive continent in the world.

## **1.2. RATIONAL AND MOTIVATION FOR THE STUDY**

The motivation for this study came from my personal experience as an office-based educator since 2000. Since 1994, education and curriculum transformation had been the “buzz” words in South Africa, and year 2000 was still the period of endless change. Within this period there had been a number of studies (Chisholm & Vally, 1996; Baatjes, 2003) conducted with a focus on teachers and school management teams (SMTs). However, it seems to me that very little, if any, research had been conducted on office-based educators in the advisory services. As an office-based educator myself, I wanted to investigate the impact that globalisation has on the professional lives and work of subject advisors.

The focus for this study was to try to understand the impact that the ‘subject advisors’ feel in terms of their roles and the impact of globalisation. The key elements of the education reform package are embedded in three interrelated policy technologies: the market, managerialism and performativity. Bernstein (2000) argues that the policy technologies of education reform are not simply vehicles for the technical and structural change of organisations, but are also mechanisms for reforming teachers and for changing what it means to be a teacher. The technologies of reform produce new kinds of teacher subjects. Such reforms change ones ‘social identity and our subjective existence and our relations one with another’ (Rose, 1989:57). This study looked at the aspects of reform that cause problems, especially, changes in attitudes, behaviour and changing roles for both office and school based educators.

According to the Employment of Educators Act 76 of 1998, “the aim of jobs at offices is to facilitate curriculum delivery through support in various ways”. Office-based educators work at the following office levels of the Department of Education:

- National Office
- Provincial Office
- Regional Office
- District Office
- Circuit Office

My unit of study was conducted at the district level because that is where “Subject Advisors” are located in terms of their workstations. This is a critical level of operation in terms of the curriculum implementation and direct support to schools. The advisory service section is responsible for the training of, and support for, educators in all curricula related issues. The service that advisors provide to schools is expected to meet the standards set in the Service Delivery Charter (Department of Education, 2005). The first three strategic goals indicate a shift from local emphasis to global approach in all activities of the DoE. It is in this context that the focus is on developing educators’ abilities to “equip them (learners) with knowledge, skills, values and attitudes to meet challenges of the 21<sup>st</sup> century, ...Transform the Department into a 21<sup>st</sup> century learning organisation...and transform schools into self-reliant and effective learning institutions” (Service Delivery Charter, 2005).

My observation was that there seems to be a shift from rendering support to schools to a situation where subject advisors spend more time implementing management and monitoring instruments such as Integrated Quality Management System (IQMS), Super Start (a school monitoring system that is conducted by office based educators at the beginning of the year to check if teaching and learning all schools does take place from the first day of the year), Head Count (a process of physically counting a number of educators, staff and learners in each school), and so on. Such instruments have not been part of the education system prior to 1994. Since the advent of the new political dispensation and the re-admission of the country into the international community, however, this state of affairs has had to change. It is thus on these bases that this research attempts to establish the impact such changes have in the lives and work of the office-based educators.

### **1.3 THE WORK OF OFFICE-BASED EDUCATORS (SUBJECT ADVISORS) IN SOUTH AFRICA.**

As a precondition to understand the work of office-based educators in South Africa, it is vital to begin with an engagement with Employment of Educators Act 76 of 1998 in order to analyse conditions laid for "Office based educators". The core process in education is curriculum delivery. The strategic levers for curriculum delivery are In-service Education and Training (INSET), Education Management

Development (EMD) and enabling functions. The aim of jobs at offices, on the other hand, is to facilitate curriculum delivery in various ways. This study examines if in practice subject advisors are doing, or not, what the policy prescribes. The Employment of Educators Act, for example, prescribes core duties and responsibilities, and still allows flexibility for supervisors to develop specific duties and responsibilities for each post on the bases of job content as may be applicable. The core duties pertain to leadership, communication, financial planning and management, strategic planning and transformation, policy, research and development, staff development, and curriculum development. More specifically, the core role of a subject advisor is curriculum delivery, which the Employment of Educators Act 76 of 1998, defines as:

- To assist in equitable deployment of staff and resources to facilitate teaching and learning;
- To provide pastoral support (guidance and counselling) and to learners wherever requested by institutions;
- To maintain effective partnerships between parents and school staff to promote effective teaching and learning;
- To develop systems for monitoring and recording progress made by learners towards targets set;
- To support initiatives to improve numeracy, literacy and information technology as well as access to the wider curriculum;
- To facilitate curriculum at institution/District/Provincial/National level;
- To provide guidance/assistance in learner assessment and;
- To promote the National campaign on Culture of teaching, Learning and Service (COLTS).

For the DoE and all educators, the main objective is to ensure quality public education for all and to constantly improve the quality of learning and teaching. It is on these bases that teachers and subject advisors are accountable to the wider community. The DoE has the responsibility to provide facilities and resources to support learning and teaching. Successful educational outcomes also depend upon empowering, motivating and supporting educators. To this end, the DoE has put in place quality management measures that seek to monitor and support these

processes. The philosophy underpinning the Integrated Quality Management System (IQMS), for example, is an example of such measures and is based on the following five beliefs:

- To determine competence;
- To assess strengths and areas for development;
- To provide support and opportunities for development to assure continued growth;
- To promote accountability and;
- To monitor an institution's overall effectiveness.

Performance measurement is part of IQMS and is meant to guide school change, but it cannot simply be taken at face value. Schools are not only accountable to direct recipient of services, but to all tax payers who support their operation and to political structures that control their fiscal resources and the standards by which their results will be judged (Smyth, 2002). There are three programmes that need to be in place to enhance and monitor the performance of the education system. These are:

- Developmental Appraisal;
- Performance measurement and;
- Whole School Evaluation.

The purpose of Developmental Appraisal (DA) is to appraise individual educators in a transparent way, with a view to determine areas of strength and weaknesses, and to draw up programmes for individual development. The purpose of Performance Measurement (PM) is to evaluate individual teachers for salary progression, affirmation of appointments, and rewards and incentives. The purpose of Whole School Evaluation (WSE), on the other hand, is to evaluate the overall effectiveness of a school, including the support provided by the district, school management, infrastructure and learning resources, as well as the quality of teaching and learning (ELRC Collective Agreement 8 of 2003). The Employment of Educators Act 76 of 1998 indicates that the main function of subject advisors is to provide curriculum support to schools. With the advent of IQMS, the emphasis

seems to have shifted to performance management. This study seeks to investigate the possible reasons for this shift and the impact it has had on the work and professional lives of subject advisors. It is on basis of these concerns that the research questions of the study are:

- How do office-based educators perceive educational reform?
- How has education reform affected the professional lives and work of office based educators (subject advisors)?

#### **1.4 THE STRUCTURE OF THE STUDY**

Chapter One of this thesis offers the background information to the study. It explores reasons for choosing a case study based in one the district offices in KwaZulu Natal. It also provides the rationale and motivation for its importance. The focus is on outlining the advisors' perceptions regarding the impact caused by globalisation on their work. Chapter Two presents literature review that provides a conceptual and theoretical framework for the study. It covers various aspects of globalisation such as globalisation as a phenomenon, various perspectives regarding the subject of the study, role players, impact on education and new organisational principles.

Chapter Three presents the research methodology adopted to collect and analyse data that helped to answer the research questions. I used a qualitative research method in order to elicit the impact through the advisors' feelings and perceptions about their work. I used a questionnaire and a focus group interview as my instruments to collect data. Chapter Four presents the research findings. The data was coded, categorised and themes emerged that formed the basis for the findings. The findings are based on both the questionnaire and the focus group interview.

Chapter Five presents the discussion and analysis of the findings using globalisation themes as lenses to interrogate the findings. The analysis will help in determining the impact of educational reforms on advisors' professional lives and work. The themes that are discussed in this chapter are new value context, performative

activities, Advisors' identity in a new managerialist environment advisor as an agent of change, management expertise versus professional expertise, accreditation and universalisation, international competitiveness, and privatisation. Chapter Six presents conclusions, recommendations and limitations of the study. Some of the recommendations include a general survey on advisor attitudes and perceptions done at a larger scale, for example, at provincial level. Roles and functions will have to be revised in order to be inline with practical conditions in which advisors find themselves.

## **1.6 CONCLUSION**

In this chapter I have presented and discussed the purpose and the rational of the study. This entailed a brief background to the work of the Office-based educators in terms of their conditions of employment and the nature of work they are expected to perform. Following this, the questions of this study were introduced and the rational was discussed. Finally the outline of the study was presented and each chapter of this study was introduced. The next chapter will explore the literature that is available in relation to the topic.

## **CHAPTER TWO**

### **2.1 INTRODUCTION**

This chapter reviews literature that engages with a conceptual and theoretical framework for this study. According to Neumann (1997), the first step in narrowing a topic into a researchable question is to examine what the literature tells us about it. This, among other things, enables the researcher to gain insight into the topic and identify key issues that need warrant broader exploration. Literature reviews, furthermore, play a crucial role in determining both the feasibility and credibility of research as it places the research in a broad framework and provides a foundation for further research. After reviewing literature, the researcher is challenged to think about how his work extends, modifies, supports or challenges that of others (Ball, 1993).

Through my literature search on the topic, I could not find any research on the impact of globalisation with regard to office-based educators. This meant there is ample room for such research. However, I managed to find literature that is related to globalisation and education reform, with a focus on education policy, power relations and teachers' work. I therefore used such literature to draw similarities and apply relevant insights to my own study. The literature highlights many themes that impact on teachers' lives and professional roles. For the purposes of this research, however, I discussed globalisation as a phenomenon (generally) and globalisation and education. In addition to this, I have reviewed literature relating to education and curriculum reforms currently taking place in South Africa.

### **2.2 GLOBALISATION AS A PHENOMENON**

According to Torres, "globalisation is a broad concept involving many perspectives and definitions, and may be examined through an analysis of various aspects and structures of society such as the economy, society, culture and politics". Torres (2003: 98) explores various definitions and concludes that "there are many globalisations". For example, globalisation has been defined as 'the intensification of worldwide social relations which link distant localities in such a way that local happenings are shaped by events occurring many miles away' (Held, 1991:112).

Another view sees globalisation as a feature of late capitalism, or the condition of post-modernity, and more importantly, the emergence of a world system driven in large part by a global capitalist economy. Others see globalisation as the transformation of space in which complex interactions and exchanges once impossible become everyday activities (Urry, 2000: 91). A more radical view sees globalisation as an assault on traditional notions of society and the nation-state and the very nature of citizenship and social change is dramatically altered (Held, 1991: 127). The term may also be defined as an overarching concept that embraces the various aspects that connect relationships between people and the ordering of society. On contrary, Torres (2003) sees it capturing the sense of a world village rather than an idea of separate communities depicted by different colours on a map (Torres, 2003: 16). According to Pandey (2001) referenced in Held (1991:125), “globalisation is the widening, deepening and speeding up of worldwide interconnectedness in all aspects of contemporary social life from cultural to criminal, the financial to the spiritual.”

Globalisation may also be used as a lens through which issues relating to social or political discourses may be interpreted or understood and defined as “links in communication, finance, trade, politics, and the like, which tie nations throughout the world together in the world system” (Cockerham, 1995: 24). This definition seems to highlight a purely economic perspective to globalisation and may also be used to explain various other areas in that it also “refers to increasing global connectivity, integration and interdependence in the economic, social, technological, cultural, political, and ecological spheres”(Wikipedia, 2007: 290) as well. This broad definition highlights the trend from a national collective identity to a new world identity. The implication of this is that issues pertaining to a small community or group now involve a wider area and the resultant shift will mean a “global responsibility”.

Clearly, the meaning of globalisation is open to several interpretations. Some view it as a process that is beneficial and key to future world economic development that is inevitable and irreversible. Others regard it with hostility and fear that it increases inequalities within and between nations. They believe it threatens employment and living standards and prevents social progress. Lechner (2004) has suggested that

there are three main ways of looking at globalisation, (i) a world economic system, (ii) a world polity, and (iii) a world culture. The discussion of each of these that follows draws largely from Aitchison's (2007) summary of Lechner's (2004) work.

### **2.2.1 Globalisation as a world economic system**

In this view, globalisation is the completion of the process that has taken several centuries by which the capitalist world system has spread worldwide. The modern world-system basically has its foundations in various previous world systems such as feudalism in Europe. This gave way to technological innovation and the rise of market institutions, as we know them today. Advances in production and incentives (for example, Industrial Revolution) for long distance trade, for example, stimulated Europeans to establish an occupational and geographic division of labour in which capital-intensive production was reserved for core countries, while peripheral areas provided low-skill labour and raw materials. Understandably, the unequal relationship between European core and non-European periphery inevitably generated unequal development (Wallerstein, 1974:87). The basic linkages between the parts of this world system are economic, and it coexists with a variety of national political systems (Aitchison, 2007).

According to Wallerstein (1974:33), the capitalist world economy has no one single political centre. This is why it has been able to flourish precisely because it has had within its bounds not one, but a multiplicity of political systems which have given capitalists freedom of movement that is structurally based and has made possible the constant expansion of the world system. It is an economic system that concentrates on endless accumulation of capital and the commodification of everything for sale in the market for profit, even if this leads to a loss of human qualities. Supporters of this view see it as an irreversible inevitability.

Critics see this drive towards a globalized capitalist economic system as being dominated by supranational corporate trade and banking institutions that are not accountable to democratic processes and/or national governments. It is a deliberate ideological project of economic liberalisation that subjects states and individuals to more intense market forces. Such critics usually argue that this world economic system faces 'un-resolvable crises and will eventually collapse' (Aitchison,

2007:13). South Africa has not escaped the influence of this bleak picture accompanying economic globalisation, especially after 1994 when it was re-admitted into the world community after the collapse of the apartheid regime. After all, it is at this time that South Africa began to implement economic reforms and joined international organisations such as the World Trade Organisation (WTO) with the hope that South Africa's industries will grow and create more employment opportunities for the citizens.

### **2.2.2 Globalisation as a world polity**

According to Aitchison (2007:23), the term polity refers to 'political or governmental organisation and authority.' In this view, globalisation is about a new form of world political or governmental organisational culture. There is a rationalised world order that shapes institutional and cultural bodies. Most nations now share common frameworks about governments, the settling of international disputes, schooling and education, notions of citizenship and the identity of individuals. It is largely through models that globalisation impose this new order, it defines actors (e.g. nation states, individuals), purposes (e.g. development, progress) and principles (e.g. human rights, justice).

The major organisations that make this order happen are international governmental organisations like the United Nations, nation states, voluntary associations, non-governmental organisations, interests groups and social movements. Through this, world polity has become common and is supported by many trans-national groups. However, there are regional differences and contradictions such as in relation to human rights and the balance between freedom and equality. Some argue that this new world polity in fact engenders new political and social problems and creates new conflicts (Aitchison, 2007).

### **2.2.3 Globalisation as world culture**

In this view, globalisation is best seen as the move towards the world being seen as a single place with an increasingly common culture. International communications, transportation and conflicts have intensified relationships across national and societal boundaries. It is in this context that countries identities, regional and local cultures have been relative-ised as they become conscious of themselves as only

part of a greater whole. However, the comparison and confrontation of contending worldviews create new cultural conflicts and the world culture is not harmonious. This may be seen, for example, in the rise of so called, 'Islamic Fundamentalism'. Globalisation also provokes reaction and resistance that may also take global forms. Critics often argue that this world culture leads to cultural homogeneity and is largely a spread of the North American culture. (Aitchison, 2007).

## **2.3 PERSPECTIVES ON GLOBALISATION**

According to Torres (2003), globalisation is far too complex to present in a formulaic manner because the concept has multiple manifestations interacting simultaneously in a fairly convoluted fashion. Consequently, instead of presenting one notion of globalisation, Torres identifies four primary manifestations (perspectives) that stand out in today's context.

### **2.3.1 Globalisation from above**

Globalisation from above is framed by an ideology of neo-liberalism and calls for an opening of borders, the creation of multiple regional markets, the proliferation of fast-paced economic and financial exchanges, and the presence of governing systems other than nation-states. Neo-liberalism seeks to privatise virtually every process or service that can possibly be turned over to private capital. Selective deregulation is the motto of this version of globalisation. According to Theodora (2003), agencies, multilateral or bilateral, such as the World Bank, the International Monetary Fund (IMF), United Nations Educational, Scientific, and Cultural Organisation (UNESCO), and others, have promoted a model of neo-liberal globalisation. This perspective links well with Lechner's interpretation of globalisation as a world economic system.

### **2.3.2 Globalisation from below**

Globalisation from below is largely manifested in individuals, institutions, and social movements actively opposed to that which is perceived as corporate globalisation. It is also known as an anti-globalisation perspective. This form of globalisation can be considered as the antithesis to globalisation from above. For these individuals and groups, no globalisation without representation is the motto. The anti-globalisation movement argues positions focused on social justice and

equality. These movements have had a variety of important dissident voices. For example, starting with Seattle in 1999, world summits such as the September 2000 IMF (International Monetary Fund) World Bank summit in Prague and the July 2001 G-8 meeting in Genoa have taken place amid a chorus of critics reacting to the closed nature of global decision making processes. There is a multiplicity of oppositional groups who are vast and growing in number and degree of discontent (Rhoads, 1985).

### **2.3.3 Globalisation of Human Rights**

Globalisation of Human Rights is a perspective that pertains more to rights than to markets. With the growing ideology of human rights taking hold in the international system and in international law, many traditional practices endemic to the fabric of particular societies or cultures now are being called to question, challenged, forbidden, or even outlawed. The advancement of cosmopolitan democracies and plural citizenship is the theme of this version of globalisation. The movement towards universal human rights is a powerful force that pushes beyond conversations about certain rights being merely a good idea to what which ought to be the birthright of every person (Bunch, 2001). This perspective links well with Lechner's interpretation of globalisation as world culture.

Key concerns of global human rights centres largely on the universal rights to food, water, and health care. Others suggest that the right to participate in society's governance structure and the right to quality education also ought to be universal. In terms of the latter two rights, schools and universities become key sites of struggle, as concerns of what constitutes quality and the role that educational institutions play in shaping expectations and dispositions relative to civic participation come to the forefront. Teacher unions have played major role in this struggle (Torres, 2001).

### **2.3.4 Globalisation of the international war against terrorism**

According to Apple (2005), globalisation of the international war against terrorism has been prompted by the events of September 11<sup>th</sup> which were interpreted as the globalisation of terrorist threat and the reaction of the United States to the event, has produced massive change at a global level. The anti-terrorism response has been militaristic in nature, resulting in two coalition wars led by United States and

Britain against Afghanistan and Iraq. It is important thou to mention that there are many Christians, Atheists and Hindus who live in these Muslim countries. The emphasis is on security and control of borders, people, capital, and commodities that is the reverse of open markets and high-paced commodity exchanges. Security as a pre-condition of freedom, is the theme of this form of globalisation (Apple, 2005). Apple's (2005) conclusion is that, anti-terrorist initiatives continue to transform global relations in the spheres of economics, politics, culture, and education.

## **2.4 GLOBALISATION ROLE PLAYERS**

According to Mebrahtu ( 2000), globalisation is highlighted by the emergence of three types of players, those (i) who globalise, those (ii) who are globalised and those (iii) who are left out by globalisation. Those who globalise concentrate on capital, resources, knowledge and the control of information. Those who are globalised are "information poor" and "knowledge poor" workers and consumers. Those who are left out have little or no access to information and knowledge, with no absorptive capacity as consumers, and no relevance to production. Those who globalise will probably remain a minority, but society will be affected by globalisation according to the strength of its social cohesion and the degree of integration of the institutions that belong to it. This study seeks to understand how subject advisors are positioned in relation to globalisation and their work; hence the following section will look at globalisation and education.

## **2.5 GLOBALISATION AND EDUCATION**

The concept of globalisation may seem far removed from the practices of the classroom. It may also seem somewhat distanced from nation state education policy-makers. However, the literature reviewed here will show that education is integrated within the international economic agenda couched within a discourse of improving competitiveness, standards and quality. Education reform is spreading across the globe, as Levin (1998) terms it, like 'a policy epidemic'. An unstable, uneven, but apparently unstoppable, flood of closely inter-related reform ideas is permeating and re-orienting education systems in diverse social and political locations with different histories. This epidemic is carried by powerful agents such as the World Bank and the OECD. It appeals to politicians of diverse persuasions

and is becoming embedded in the 'assumptive world' of many academic educators (Ball, 1993). The novelty of this epidemic of reform is that it does not simply change what people, as educators, scholars and researchers, do: 'it changes who they are' (Ball 1993: 113). For example, many young black South Africans appropriate the Western culture through music clothes, food, and life more than their own African culture. In general terms, the new technologies of reform play an important part in aligning public sector organisations with the methods, culture and ethical system of the private sector. The distinctiveness of the public sector is diminished.

The key elements of the education reform 'package' are embedded in three interrelated policy technologies: the market, managerialism and performativity. When deployed together, these new technologies produce what the Organisation for Economic Cooperation and Development (OECD) calls 'a devolved environment' which 'requires a shift by management towards setting an overall framework rather than micromanaging and changes in the attitudes and behaviour on both sides' (OECD, 1995). The changing roles of the central management rest on 'monitoring systems' and production of information. It is with these aspects of reforms that cause problems, especially, changes in attitudes and behaviours and changing roles for both office and school based educators (Ball, 1993).

This research seeks to understand the impact that the 'subject advisors' feel in terms of their roles and the impact of globalisation. Bernstein (2000) argues that the policy technologies of education reform are not simply vehicles for the technical and structural change of organisations, but are also mechanisms for reforming teachers and for changing what it means to be a teacher. The technologies of reform produce new kinds of teacher subjects. Such reforms change ones 'social identity and our subjective existence and our relations one with another' (Rose, 1989:57). Change is so rapid that the education system has to keep itself abreast with the latest developments. It is therefore important to adopt a dynamic policy and infrastructure of education that can continually renovate itself. On these basis, education is to be a dynamic process, not only for imparting knowledge as a finished product, but also to generate interests and curiosity, inculcate attitudes and values and teach essential skills for independent study and judgement (Pandy, 2001).

Education works as the potential instrument of globalisation. The progress of globalisation concept is closely related to the pace of educational development. The spread of education, the preparation of the educated and skilled citizens and training of intelligentsia promote modernisation. The effects of globalisation have driven tremendous changes within education systems across the globe. The existing problems in education have led to the globalisation of the education sector that should be oriented towards trans-national competence. This means that the education system, methods, tools, and structure must follow global economic trends. The globalisation of education has means of changing the world by increasing international understanding through bringing together peoples from different countries (Pandey, 2001).

Mebrahtu (2000) suggests that there are at least two ways of looking at the effects of globalisation on education. The first is to what extent education systems are being "shaped" by globalisation. The second is what kind of policy reforms should be adopted to address the consequences of globalisation. Should policy makers accept globalisation as reality and an unavoidable trend that society should adapt to; and is the purpose of educational reform to draw benefits from the positive social consequences, while maintaining within tolerable limits the negative consequences of globalisation? This study is orientated towards Mebrahtu's first view since it explores how subject advisors' work is being 'shaped' by globalisation.

The impact of globalisation on the economic systems and social policy has become the focus of many scholars in different parts of the world. The impact of globalisation on education policy, in particular, attracts attention, especially in third world countries such as South Africa. The relationship between globalisation and economic policy, national curriculum, privatisation of education, merges of educational institutions, language policy, formalisation of non-formal education and human resource development demand, greater attention (Bond, 2000). In the case of South Africa, globalisation is used to denote the rapid transformation by a process of internalisation that has restructured the way the economy and society are organised. The effects of these transformations at a macro level are categorised along a number of planes and this impacts on Education. For example, the global

economic dynamic has brought new terminology (and changes to others) into existence such as "learning society", "lifelong learning" and desires to make education system even more receptive to the goals of a global world through reviving human capital theory as a key ingredient of instrumentalist education. According to Vally (n.d), the macro-economic policy GEAR resuscitates human capital theory as it sees education and training as a key determinant of long-term economic performance and income redistribution.

According to Vally (2000), the discourse of relating education to economic rationalisation and success in international competition permeates all the major post 1994 educational reforms in South Africa. It permeates the National Qualification Framework, Curriculum 2005 (Revised as National Curriculum Statement), the Further Education and training policy and Skills Development Strategy. Subsequent effects of the globalisation process include the emergence of systems related to funding, accountability, course design, access, etc. For instance, the World Bank's input-output model on class sizes which is used as an instrument for budgetary control has been adopted by South African government and reflected in policy on class sizes (World Bank, 1995). This policy decision has significant implications for pedagogy, management, assessment, curriculum planning, guidance, support, etc.

Another key development of globalisation is the structuring of educational institutions based on corporate culture/models where social Darwinism, competition, managerialism and individualism are dominant trends (Giroux, 2004). Corporate culture affects not only the way institutions are structured but also the way people work. The corporate culture model is further unpacked through an explanation of the organisational principles in the discussion which follows.

## **2.6 NEW ORGANISATIONAL PRINCIPLES WITHIN EDUCATION**

### **2.6.1 Efficiency and accountability**

There are four key reforms that have been associated with globalisation effects in education. Through these, education can be redirected to take business world principles and easily serve the interests of the capitalist's economy. In the interest of so-called productive efficiency, for example, the provision of education service

has been made contestable, and in the interest of so-called allocative efficiency, state education has been marketised and privatised (Burbules & Torres; 2000). Concerns about efficiency and accountability are manifest in the effort of legislatures, governing structures and policymakers to increase the productivity of teachers while decreasing financial support to schools.

### **2.6.2 Accreditation and universalisation**

With regard to accreditation and universalisation, major efforts are underway throughout the world to reform academic programs through accreditation processes and various strategies that produce increased homogeneity across national boundaries. For example, the recent effort by seventy-four Japanese universities to open law schools based on the model of American-style graduate level legal education (Brender, 2003) and UNESCO's plan to develop an international quality assurance agency to monitor global higher education ventures. In this context, the use of the term 'accreditation' is not identical to how it is used in different countries. Eaton in (Dunkerley & Wong, 2001) defines accreditation to mean compliance with quality standards, mechanisms for quality assurance and strategies for quality improvement. An institution or a programme is considered accredited if:

- It meets the standards of accrediting organisation, sustains effective means of assuring quality;
- It sustains effective means of assuring quality-has processes and mechanisms to manage quality;
- It maintains strategies to improve its quality over time;

Eaton further identifies four purposes that accreditation serves. These are to:

- Indicate quality-accredited status as a signal to students and the public that an institution or programme meets at least minimum standards;
- Assist with access to state funds-for students to get grants and loans for tuition;
- Ease transfer-it becomes helpful to students who wish to move from one institution to another and be credited with courses and;

- Engender employer confidence-most employers consider accredited status of an institution or programme when evaluating credentials of job applicants, and when deciding to support tuition requests from current employees seeking additional education.

The universalisation of the curriculum is also referred to as ‘Internationalisation’ of the curriculum. According to Vidovich (2004), this internationalisation of education has been conceived in the narrow economic terms of buying and selling education products and services across national boundaries. Arguably, it involves complex interrelationships of economic, cultural and social dimensions. The Organisation for Economic Cooperation and Development (OECD) has defined universalisation as an international orientation in content, aimed at preparing students for performing (professionally and socially) in an international and multicultural context, and designed for domestic students as well as foreign students.

### **2.6.3 International competitiveness**

Reforms associated with international competitiveness are akin to what (Martin & Carnoy, 2001) described in the schooling sector as competition-based reforms. These reforms are characterised by efforts to create measurable performance standards through extensive standardised testing. For example, the Common Task Assessment (CTA’s)-in South Africa, introduction of new teaching and learning methods leading to the expectation of better performance at low cost and improvement in the selection and training of teachers.

According to Ball (1993) the introduction of market forces into the relations between schools means that teachers are now working within a new value context in which image and impression management are more important than the educational process, elements of control have been shifted from the producer (teacher) to the consumer (parents) via open enrolments, parental choice and per capita funding. In relation to choice between schools, the key element is competition. The processes of competition in education are driven by price and by supply and demand. Ball (1998) suggests that the discourses of financial planning and economic rationalism have operated in an antagonistic relation to the discourses of teaching and learning and pupil welfare. Here impression management and responsiveness to the consumer, is used to re-orientate the values of the institution and to subvert and

reorder the priorities and purposes through which it presents itself. The image of the school is clearly being aimed at certain “sorts” of parents. Here the forces of the market are driven by a sub-set of class and educational needs and interests (Ball, 1998). Competition-based reforms in higher education tend to adopt a vocational orientation and reflect the point of view that colleges and universities exist largely to serve the economic well-being of a society. Subjects that are deemed as not contributing to the economy, for example, literature studies, social sciences, religious studies, etc. are being phased out through under financing and ultimately face the threat of shut down in tertiary institutions in South Africa.

Jansen and Christie (1999) critically review the ideology that underpins South Africa's curriculum framework. In particular, they suggest that the introduction of Curriculum 2005 and funding of schools are influenced by neo-liberal fiscal policies that have reduced social spending as proposed in the GEAR (Growth equity and redistribution) policy. Education in South Africa is being influenced and shaped by global market economy. The impact of globalisation is shaping and influencing curriculum change in schools. For example, staffing is dependent on the number of learners enrolled in that particular year, as a result many teachers are rationalised and transferred to other schools. The curriculum is biased towards Mathematics and Science because these subjects are viewed to be most suitable for economy and markets. The introduction of the Integrated Quality Management System (IQMS) is used as an instrument to measure the delivery and competitiveness of teachers. All these new measures are signs of global economic influence in the education system.

Boomer (1992) calls for teachers to change from within as individuals first before they could implement curriculum change. He argues that "re-skilling" is important through a process of critical reflection by individual teachers in order to have a link between "practice and praxis". It is important for teachers to do action research of own position as teachers and as office-based educators. The impact of education reform would require teachers and advisors to be re-skilled in order to fit into the new roles that reforms demand. Already the department of education has redefined the roles of teachers and advisors on paper. This research seeks to take a close look in terms of the impact these have on the work of subject advisors.

Longstreet and Shane (1993) examine the influences that shape the curriculum, particularly the impact of social values that aim to reproduce the social and political structures of the community. They discuss what they term as "Vectors of change", meaning a sudden new cultural order which introduce a "sudden turning point (vector). This sudden change compels swift change to all social institutions such as education because they no longer fulfil their function. The sudden change creates a cultural gap between past and present. South Africa is a clear example of this view. The question they ask is whether teachers resist or accept changes in the curriculum. They call for teachers to be reflective of their roles in relation to reforms. Longstreet and Shane caution about issues that need to be closely observed by teachers when implementing new curriculum especially when trying to close the gap between old and new social and political dispensations.

More recently, the notion of education for global competitiveness has reached African education policy discourse. Ghana, Kenya, and South Africa display an understandable concern to improving the competitive focus of their curriculum. In doing this, each country show striking differences from each other. It depends on the socio-political backgrounds that illustrate the complexity of the debate and obstacles that lie in the way of promoting learning-led competitiveness through schooling (King& McGrath, 2002). This is one of the policy challenges facing South Africa, and other countries, in dealing with the system that can respond to changed circumstances, there needs to be a high level of capacity to learn across sectors and internationally. In order for the country to be internationally competitive, its education and training systems should be compatible with those in the rest the world (Department of Education, 1997).

#### **2.6.4 Privatisation**

Privatisation is the fourth major reform effort linked to neo-liberal globalisation and perhaps the most dominant. Neo-liberal economic supporters view the market place, as the ideal regulator of services, products, and costs. Consequently, if we think of education as a product or service, then from a neo-liberal perspective the best way to regulate schools, colleges, and universities is to allow the market to do so. Nation states need not fund or concern themselves with tuition costs, the market can take

on such responsibilities quite handily. If institutions price themselves too highly, prospective students will inform them by selecting other less costly institutions. In South Africa, the legislative framework recognizes the need for others to assist in funding the operation of public educational institutions, for example, the South Africa Schools Act (*SASA*) directs that a School Governing Body (SGB) must take all reasonable measures possible, including school fees, to supplement the resources supplied by the State. *SASA* requires the Education Minister to make regulations about the criteria and procedures for exempting parents from paying fees, which has been done in national regulations (Coombe & Goddle, 1996).

However, McLennan (2000) argues that the informal structures and networks of relationships have been inadequately addressed in the design and implementation of the new system in South Africa. Braslavsky (2001) warns that concepts such as decentralisation and site-based management have become very popular, leading to the danger that they will be accepted without question. In other words, even good ideas need to be contextualised. The government encourages the private sector to help sponsor and support education in various ways. Some of the schools have received funding from business in various forms, for example, buildings, computers, stationary, etc. Schools are also encouraged to register with department as 'section 21'. Section 21 schools have a direct control of their funds and are audited at the end of a financial year. With this move one notices a shift of financial control from the state to schools. This move indicates that education provision is shifting towards self-managing students, self-managing teachers and self-managing schools and institutions. Stormquist and Monkman (2000) stated that, the increasing importance of the global markets has had several repercussions on formal schooling. First, criteria employed in firms for efficiency and productivity, are being extended to schooling, sometimes in an inappropriate version. Secondly, focus has shifted from a child centred curriculum to economy centred vocational training. Thirdly, education is losing ground as a public good to become another marketable commodity. The state has become limited in its responsibility to schooling, often guaranteeing basic education but extracting user fees. Fourthly, teachers' autonomy, independence and control are being reduced. To serve the technological needs of the market better, new forms of flexible training and vocational training and technical education are emerging as private offerings.

### **2.6.5 New Managerialism**

Kydd argues that the rise of managerialism and the erosion of professionalism is inappropriate for education. She associates the former with market forces, business management and economic criteria, and the latter with curriculum and teacher autonomy. Arguably, the dichotomy is not as straight forward. Kydd (1997a: 116-117) further argues that 'in the past' 'good managers' in education were 'good teachers', however, 'in a managerialist environment this duality is more difficult to sustain'. The argument being that as education manager's role extends beyond curriculum issues, they become less educational and less professional. This is certainly a concern but it is contentious. There are arguments about the need for a holistic, developed educational management linking curriculum, staffing, resource and other factors like the impact of globalisation. Moos et al. (1998) argue that governments have promoted 'managerialism'; in practice education management is developing in differing ways and not blindly applying business practices and ideology to education. There are tensions between arguments about management and profession as antithetical, of management controlling professionals, of management and professional activities as separate but co-existing in education, or of management as being professional, which need to be further explored. This research project will play a role in determining the management/professional relationship in one education context. A key sub-text question underpinning the research is, "to what extent are 'subject advisors' required to act as 'managers' and to what extent as 'professionals'? Are these roles in conflict?"

Myth (2002) stated that relatively little is known about how teachers are affected by reforms that have moved schools increasingly in the direction of becoming self-managing schools. He adds that his paper is a contribution to the body of theoretical literature and empirical research that is expressing increasing alarm at the effects of school reform and the new managerialism on schools and teachers' work. Some of these effects are pre-set learning area outcomes that are market driven, monitoring tools connected to performance bonuses, commodification of education through private schools and institutions. It is a confirmation of trends identified as already being well underway internationally (Gewitz, 1995). There are arguments about globalization impacting on the organization and purpose of education. Yet there is

evidence also of the development of education management in specific contexts, influenced by the school culture, the local community and the nature and values of those providing management and leadership. Change is pervasive, influencing education management and needing to be managed within education. Education management, which is school-focused (Moos & Dempster 1998), based on interpersonal skills, judgments and values rather than formal managerial controls and procedural approaches (Blasé & Anderson, 1995) is advocated.

Education management requires a balance between individual judgment and awareness of the appropriate actions for one's context (Kydd, 1997). This raises questions about values and ethics and the ability of managers to judge and reconcile competing demands, which are inherently problematic (Moller, 1997). These shifts in conception of education management have implications for the roles of teachers, principals and subject advisors.

## **2.7 CONCLUSION**

The Economic and Social Science Research Council (ESSRC), commends South Africa on doing an excellent job connecting to international state-of-the-art research, policy and practice in education. However, even when new knowledge can be successfully taken on board at the macro system level, this does not mean it will transfer to the micro level - the school – where the new knowledge must be internalised if the restoration of a culture of learning and teaching is to occur (Le Métais, 1999). It is evident that South Africa's education system is shaped by forces of globalisation, which in many ways impact on the way the educator system works and on the experiences of role players in the system, including teachers, learners, and subject advisors and so on. The next chapter will focus on the research methodology and instruments that I will use to collect the data.

## CHAPTER THREE

### 3.1 INTRODUCTION

The purpose of this chapter is to present the research methodology used in the study, and this is done within the context of this study, which is to explore ways in which globalisation processes affect the professional roles and work of Office-based educators (subject advisers). The literature review in Chapter Two revealed that very little, if any, research has been conducted on office-based educators in the advisory services. According to the Employment of Educators Act 76 of 1998, an office-based educator is a teacher by profession based in offices of the department, for example, National, Provincial, Regional, District and Circuit offices. The aim of jobs at offices is to facilitate curriculum delivery through support in various ways. For the purposes of this study I will focus mainly on subject advisors at a district level. The core function of subject advisors is to give professional support to teachers. They train teachers in most of the reforms that are being introduced in the education system. To reiterate, my research questions are as follows:

- How do office-based educators perceive educational reform?
- How has education reform affected the professional roles and work of office based educators (subject advisers)?

The discussion below outlines the research design for the study. In it I present the overall methodological framework (case study) and the specific data collection techniques, including individual and focus group interviews which are aimed at eliciting responses from the interviewees about how they understand and feel about their roles and lives as subject advisors in the context of education reforms. The literature relevant to each method is also explored to substantiate and validate choices I have made. The chapter concludes with a description of how the data will be analysed. In keeping with the broad critical theory perspective that I am using as a framework for this study, the study is located within the interpretive paradigm because it allows me as a researcher to examine how power is produced and reproduced through education, and whose interests are served by education.

### **3.2 A QUALITATIVE APPROACH**

I have used a qualitative approach with the understanding that this will be most appropriate in explaining people in a social world. A qualitative approach recognises that “life is not a dress rehearsal, it is the real thing” (Sherman and Webb, 1988). Qualitative research recognises that human behaviour must be seen within a particular context, that context must be explored in a naturalist setting and that the focus is on the perspectives given by those being researched by giving them a “voice”. Burgess (1985) concurs with Sherman and Webb (1988) when he says that the essence of the qualitative approach lies firstly in its focus on the observed present. An attempt is made to obtain a participant’s account of the social setting without disturbing the process of social life within this setting. The focus of the qualitative approach is on the participants’ perceptions and experiences and the way they make sense of their lives.

Qualitative research is appealing for my topic because I am interested in researching how globalisation (as discussed in chapter 2) affects the professional roles and work of Office-based educators (subject advisors). A qualitative approach is most suitable for this topic because it seeks to get perceptions and feelings of subject advisors on how their work is being influenced by forces of globalisation. Bryman (1988) lists the characteristics of qualitative research. Firstly, it is essentially concerned with looking at events, processes, values and actions from the perspectives of those being studied. This is an important part of my research project in terms of perspectives of the subject advisers and their work being affected by globalisation. Secondly, it is concerned with describing and analysing the social settings in which those being studied are located as a means of holistically contextualising research results. The district office, where the advisers are located in terms of the hierarchical structure of the department serves as a context where they operate. Thirdly, qualitative research involves the spending of time in settings in order to gain insights into social events and processes. As an office based educator, I am able to spend time and observe how subject advisors execute their roles. The fourth characteristic of qualitative research as favouring a relatively open ended and less structured research strategy that allows for adjustments as the research demands. Qualitative research is inherently multi-method in focus and

therefore allowed me to use semi-structured interviews and focus group interviews as tools for my data collection.

### **3.3 A CRITICAL THEORY**

This study is based on the critical theory that has been used as a lens to try to understand the impact of globalisation on the work and roles of subject advisors. According to McLaren (2003), critical pedagogy is an approach to curriculum production, educational policymaking and teaching practices that challenges the received 'hard sciences' conception of knowledge as 'neutral or objective' and that is directed towards understanding the political nature of education in all of its manifestations in everyday life. These are played out in the agonistic terrain of conflicting and competing discourses, oppositional and hegemonic cultural formations, and social relations linked to the larger capitalist social totality. Critical pedagogy locates its central importance in the formidable task of understanding the mechanisms of oppression imposed by the established order, but such an understanding is approached from below, that is, from the perspectives of the dispossessed and oppressed themselves. This view links well with Torres's (2003) globalisation from below perspective, discussed in chapter 2 of this study. This form of globalisation is also known as an anti-globalisation perspective.

As outlined above, I found critical theory to be an effective tool of analysis that I could use to try to understand the impact that globalisation has on the work of subject advisors. I hope that this study and the recommendations I suggest will contribute to benefit advisors in future to better understand the nature and impact that globalisation has on their professional roles.

### **3.4 A CASE STUDY**

Nisbet and Watt (1984) define a case study as a specific instance that is frequently designed to illustrate a more general principle. A case study approach has been adopted for this study, because, according to Cohen and Manion (1992), case

studies enable in-depth probing and intensive analysis of the multifarious phenomenon that constitute the life of the unit and are aimed at understanding the unit. A case study provides a unique example of real people in real situations, enabling readers to understand ideas more clearly than simply by presenting them with abstract theories or principles (Cohen & Manion, 1992). Stuurman (1999) argues that human systems have a wholeness or integrity to them that are maintained in case studies. It gives integrity because those being studied are viewed in a holistic manner in their natural setting and able to express their feelings about their particular situation. Case studies report the complex dynamic and unfolding interactions of events, human relationships in a unique context.

Hitchcock and Hughes (1995) describe the hallmark of case studies as rich and vivid description of events relevant to the case, chronological narrative of events relevant to the case, description of events with the analysis of them and focus on the individual actors or groups of actors seeks to understand the perceptions of events. Case studies portray, “what it is like” to be in a particular situation, to catch the close-up reality and “thick description” (Geertz, 1973) of peoples lived experiences, thoughts about and feelings for, a situation. Stake (1994) recognises the somewhat problematic situation that emerges in trying to define a case study as a unique form of research. To solve this problem, he uses the criterion that the case study is not defined by a specific methodology but by the object of study. The above characteristics of a case study make it an appropriate technique for me to use. The use of Pinetown District Office as a case study is based on it as a geographical entity that has physical boundaries, and also based on organisational and institutional contexts meaning that it is part of the organogram and is part of the institution of education in South Africa. The second reason why it is a case is that it can be defined with reference to “individuals and groups involved” (Hitch-cock and Hughes, 1995) Subject advisors as individuals and as a group make a case that can be studied.

According to Adelman et al, (1980) a case study has the following six advantages that make them most suitable to educational research. A case study data is strong in reality but difficult to organise. This strength in reality is because case studies are down to earth and attention holding and in harmony with the reader’s own

experience. It provides a natural basis for generalisations (only by the reader) either about an instance or a group of people, in my case, a group of subject advisors that form a case of study. Case studies recognise the complexity and “embeddedness” of social truths by providing some support to alternative interpretations. Case studies can also be considered as products because they form an archive of descriptive material rich to admit subsequent re-interpretations. Given the educational purpose there is value in having a data source for researchers whose purpose may be different from our own. Case studies are a “step to action” because their insights may be directly interpreted and put to use. Finally, the language and the form of presentation is less dependent on specialised interpretation than conventional research reports.

Case studies do have some weaknesses and Nisbet & Watt (1984) highlight these. The results may not be generalised except where other readers and researchers see their application. Case studies are also prone to observer biasness, despite attempts made to address reflexivity, as a result, they are not easily open to cross-checking hence they may be selective, biased, personal and subjective. I will use a questionnaire and focus group interview to collect data. I hope I will be able to do cross-referencing in order to minimise some of the weaknesses levelled against use of a case study.

### **3.5 THE RESEARCH CONTEXT**

The main focus for this study is on the way Globalisation processes affect the work of office-based educators in a district office level. Very little, if any, research had been conducted with office-based educators in the advisory services. How has reform impacted in this sector? This is a gap in the literature this study hopes address. The key site for the investigation was Pinetown District Office and my unit of study was the office-based educators who work as subject advisors to support schools in curriculum development and implementation. .

#### **3.5.1 The Research Site**

I chose to use the Pinetown District office because it would be easier to get access to conduct and manage my study in terms of proximity and accessibility to a group of advisors in the advisory services. This site is one of over ten District offices in

KwaZulu-Natal Province. It works with 586 schools located in the North-West of Ethekewini Municipality.

### **3.5.2 Sampling and research participants**

Sampling is a process of selecting research participants. In quantitative research, the validity of the research depends on how rigorous the sampling procedures are. I employed the system of “purposive” sampling. Lincoln and Guba (1985) define purposive sampling as when a researcher targets subjects likely to yield the richest data for the research question under study. I also used Babie and Mouton’s (1998) convenient sampling because works well with purposive sampling. According to Jessop (1997), contextual and tacit knowledge combines to assist the researcher to direct the sampling accordingly. Patton (1980) advises that in sampling, we must ensure that “informants” are “information rich” and there are no rules for sample size in qualitative inquiry. Sample size depends on what you want to know, the purpose of the enquiry, what’s at stake, what will be useful, what will have credibility, and what can be done with the available time and resources.

The study targeted ten office-based subject advisors. According to the Employment of Educators Act 76 (1998), the aim of jobs at district offices is to facilitate curriculum delivery in various ways. This study examined the impact changes in the education system have had in work and life. This was done through asking about their feelings and perceptions about their work. There was a varied range of experiences of different advisors because there are those that became advisors before the new political dispensation in 1994 and those that were appointed afterwards. They filled questionnaire (see appendix) and I selected five advisors that formed a focus group that was part of an in-depth interview. They were identified because of the experience as an advisor before 1994 and those that were appointed afterwards. A focus group had to be gender and racially representative in order to reflect the composition of the larger group of advisors.

### **3.6.3 RESPONDENTS' PROFILE**

#### **3.6.3.1 Respondent 1**

He is a black male in his mid forties. He taught in a number of black-township schools before being appointed as a subject advisor in 1991. He worked for the Department of Education and Training (DET) before 1994 when South Africa's education was racially segregated. His work experience covers both periods before and after 1994. He has studied extensively and holds a masters degree. He loves his work as a subject advisor although he is frustrated and discouraged by the way advisors are expected to work. He is an Isizulu advisor in the Further Education and Training (FET) Phase.

#### **3.6.3.2 Respondent 2**

He is a White male in the late fifties and has taught for many years in predominantly white schools. He grew up in the Eastern Cape (formally Transkei). He joined the KwaZulu Government Department of Education, as Arts and Culture subject advisor, in the mid 1980s. He is advisor in the Further Education and Training (FET) Phase. He has worked extensively with non-governmental organisations (NGO's) and individual artists involved in various art disciplines. He is a Visual arts specialist. His scope of work involves all secondary schools, in the province, that offer art subjects as externally examinable subjects in Grade 12. He is frustrated by reforms brought in by the restructuring process. He has resisted some of the changes that he felt were affecting him negatively. He has written to the minister of education several times challenging certain decisions. He regards himself vigilant when there is a professional issue that he feels needs to be challenged. He holds university academic and professional qualifications.

#### **3.6.3.3 Respondent 3**

She is a white female in her mid fifties. She has taught in former white schools, a Teacher Training College and at University level. She is a dance and drama specialist and works as an arts and culture advisor. She is responsible for in-service training programmes for the General Education and Training (GET) Phase teachers in the Ethekwini Cluster of districts. Her role is to provide in-service training for Arts and Culture teachers. She enjoys her work and feels better positioned than

other advisors in the sample. However she also experiences challenges that she attributes to reforms that have impacted negatively on her work. She holds a masters degree.

#### **3.6.3.4 Respondent 4**

He is a black male in his early thirties. He became an advisor for Social Sciences (GET) in 2006. He has taught in former black township schools. His experience as an advisor is still limited but already he has his opinions about his experiences and observations as a new advisor. He is appointed as a Deputy Chief Education Specialist (DCES). His understanding is that he is supposed to work with School Management Teams (SMTs) on how to manage the curriculum. He is not sure what his role entails. Since he joined the office he works with subject content and not with curriculum management issues. He holds a university degree.

#### **3.6.3.5 Respondent 5**

She is a coloured female in her late fifties and has taught in former coloured schools under the House of Delegates. She became an advisor in the Foundation Phase in 1990. She has vast experience in the Foundation Phase because she also taught junior classes when she was still at school level. She is emotionally hurt by the way she has been treated. She feels that she has been marginalised and treated unfairly when promotion posts have been available. She has challenged the department through arbitration process and won her appeal. She has university degree.

#### **3.6.4 Access**

Permission to conduct this study was obtained at two levels. As I have indicated before that my study is linked with an international research facilitated by the University of KwaZulu-Natal, permission was obtained from Head Office that grants us access to various research site within the Department of Education. (see attached Appendix A) Further I have applied to the Pinetown District Manager and have been verbally granted permission to conduct my study while waiting for a written permission from head office. (Appendix B).

I agree with Walford (2001) when he says that the researcher has to continually negotiate further access to observe classrooms and interview teachers and student, because access is never total, but might be seen as an incremental continuum, where the researcher is gradually able to move from the initial permission to enter buildings to series of developed and trusting relationships with the participants. Access was provisional because it could be withdrawn any time.

### **3.6.5 Ethical Concerns**

I have taken into account that the study will have an effect on participants as it pertained to feelings and emotions about their work as subject advisors. I acted in a way to preserve their dignity as human beings. Cavan (1977) defines ethics as “ a matter of principled sensitivity to the rights of others, and that ‘ while truth is good, respect for human dignity is better’”. I made it clear to the participants that taking part in this study is voluntary and that at any time a participant can withdraw his or her participation. I made it clear that if a participant feels uncomfortable to answer any question, he or she is free to leave it unanswered. I assured the participants that in the report they will remain anonymous

## **3.7 METHODS OF DATA COLLECTION**

According to Berg (1989) referenced in Schurink (1998), more than one method should be used to collect data, since the different methods provide “different facets of the same symbolic reality” and more valid results can thus be obtained. In this study, a questionnaire and a focus group interview were used to collect data.

### **3.7.1 Questionnaires**

A questionnaire was used to gather professional biographical data focused on subject advisors’ experiences and was used to probe perceptions about their roles and work as subject advisors. There are 10 subject advisors in the district and were requested to respond to the questionnaire. As a method of data collection, a questionnaire has numerous advantages. According to Blake and Champion (1976), it is less time consuming than an interview and is therefore far more economical. It can be completed at leisure and a broad spectrum of views obtained. It facilitates the eliciting of responses to controversial issues. The administration and scoring of the questionnaire was challenging and complex.

In designing a questionnaire for this study, I took into account what Best and Khan (1986) consider as essential characteristics of a good questionnaire. It should deal with a significant topic, one the respondent will recognise as important enough to warrant spending time on. It should seek only the information that cannot be obtained from other sources. It should be only long enough to obtain the essential data. Each question has to deal with a single idea and be worded simply and as clearly as possible. I reconciled these characteristics by asking short and clear questions pertaining to advisors' work and personal experiences. Following the recommendation of Cohen and Manion (1989), a brief note was added at the end of the questionnaire thanking the participants for their responses, and soliciting an early return of the questionnaire.

Despite the numerous advantages the questionnaire has to offer as a means of data collection, researchers have pointed to several disadvantages of this method of investigation. Ary, Jacobs and Razavich (1972) raise the problem of adequate coverage if the questionnaire is of reasonable length. There is also a question of appropriately analysing data obtained in the unstructured part of the questionnaire, the 'limitation' of qualitative analysis. One final disadvantage is that often the returns are low and therefore it is not always possible to make genuinely valid generalisations. For this study it was not a concern because I was dealing with ten participants that I met often and made sure that they filled and returned a questionnaire. I had sought their permission to be part of the study before I started with data collection. Notwithstanding these suggested limitations, I took cognisance of these factors for conducting research in education and I proceeded in a way so as to maximise the response rate to the questionnaire.

#### **3.7.1.1 Questionnaire development**

Various drafts of the questionnaire were put together with the aim of collecting relevant data that will help answer the questions of the study. Drafts were discussed with my supervisors and fellow masters' students at university before it was piloted. Five copies of the draft questionnaire were given out to subject advisors from Vryheid and Obonjeni districts that were attending a meeting at Mount Aux Sources in Drakensburg. The purpose of piloting the questionnaire was two-fold; firstly, to detect any possible ambiguity in wording and concepts and secondly, to invite

comments on any aspect of the questionnaire in terms of the context of subject advisors' own praxis. From the pilot questionnaire responses, I learnt that two questions were not clear enough for respondents. I revised and streamlined them before producing the final questionnaire. (see Appendix C)

### **3.7.2 Focus group interview**

The focus group comprised of five advisors. Focus groups are a form of group interview, though not in the sense of a backwards and forwards between interviewer and group. Rather the reliance is on the interaction with the group who discuss a topic supplied by the researcher (Morgan, 1988). The participants interact with each other rather than with the interviewer, such that views of the participants can emerge rather than the interviewer's agenda dominate. It is from the interaction of the group that the data emerges. According to Bloor (1997), focus group data will contain highly specific anecdotes and stories that will serve to qualify or elaborate the general endorsement of a norm or an attitude found in responses to a structured questionnaire. The focus group interview took a form of a semi-structured interview. Hitchcock and Hughes (1989), note that a semi-structured interview allows depth to be achieved by providing the opportunity on the part of the interviewer to probe and expand the interviewee's responses. Some kind of balance between the interviewer and the interviewee can develop which can provide room for negotiation, discussion, and expansion of the interviewee's responses. The advantage of semi-structured interview is that the interviewer is in control of the process of obtaining information from the interviewee, but is free to follow new leads as they arise. It allows the researcher flexibility and freedom to probe issues that surface in the interview. To facilitate such process, I used "open ended" questions that did not place restrictions on either the content or the manner of the interviewee's responses. Cohen and Manion (1997) summarise the advantages of open-ended questions as flexible, help to clear up misunderstandings, enables a researcher to test the limits of the respondent's knowledge. Open-ended questions can also result in unexpected or unanticipated answers that may suggest un-thought-of relationships or hypothesis.

In the main I was interested in advisors that started before 1994 democratic political dispensation to work as subject advisors; because they are in a better position to share professional experiences in terms of educational reforms that have taken place over time. I also included at least two advisors that became office-based after 1994, because, they may have different or the same views about the impact that reforms have in terms of their professional lives and work as advisors. I agree with Kitzinger (1994) when he suggests that it is useful to work with pre-existing groups because they provide one of the social contexts within which ideas are formed and decisions made. They bring to the interaction comments about shared experiences and events and may challenge any discrepancies between expressed beliefs and actual behaviour and generally promote discussion and debate.

My focus group was selected from a pre-existing group of subject advisors, A focus group of 5 members was ideal to represent different racial backgrounds, gender, work experience and different age groups. Bloor et al (1997) recommend a focus group consisting of between six and eight participants as the optimum size for focus group discussions. I had planned to have six participants for the study but one of the participants could not participate because she was admitted to hospital. To have five participants worked well because members were able to engage and get a fair chance to contribute to issues that were discussed. I facilitated the interview and discussions by giving a chance to all members to have a contribution to issues being discussed. Because they were representing various aspects in terms of experiences and exposure, each member contributed his or her views. We agreed on rules on how the focus group was conducted in terms of confidentiality, respect of different views, respecting the speaker and giving a chance to all members to speak on each question being discussed. I explained that becoming a member of the focus group was not compulsory and that a member can excuse himself or herself any time if he felt that he was no longer comfortable to be part of the group.

The focus group interview was conducted at Edgewood Campus of the University of KwaZulu-Natal a central location close to work site of the participants. It was convenient in terms of space and the availability of the resources like professional recording devices. The focus group interview lasted about 2 hours because I did not want participants get bored and lose interest. The focus group discussion was

recorded using a tape recorder and a video recorder. According to De Vos (1998), focus group interviews are used in order to understand how people think or feel about an issue or products or services. The participants are given a conducive environment, so that they are able to comfortably share their perceptions. This is in line with Kruger (1994) who claims that the focus group interview is a carefully planned discussion designed to obtain perceptions on a defined area of interest in a permissive, non-threatening environment. The focus group protocol used is attached. (see appendix C)

### **3.8 DATA ANALYSIS**

Once the data was collected, I organised it and attempted to discover relationships or patterns through analysing it. Coding enabled me to organise large amounts of the data and to discover patterns that would be difficult to detect by reading alone. I used labels like, codes, categories and themes to classify and assign meaning to pieces of data. The themes that emerged from the analysis are discussed using globalisation themes as lenses to try to understand the impact changes have had in the lives of advisors. I envisage that the data analysis will contribute to a rich description of the study, including an analysis of emerging themes, interpretations and assertions about the impact of globalisation on the lives and work of the office-based educators.

### **3.9 CONCLUSION**

The next chapter will focus on data analysis and discussion of the findings based on the data collected from the questionnaire and the focus group interview.

## CHAPTER FOUR

### 4.1 INTRODUCTION

The findings of the research conducted are presented in this chapter. These findings are based on the data collected from the questionnaire and the focus group interviews. To facilitate the analysis and discussion of the findings, the voluminous amount of information was taken and reduced to categories and themes, and then the information was interpreted as advised by Nisbet & Entwistle (1970) and Cohen (1980). According to Krippendorp (2004: 34), content analysis is a “research technique for making replicable and valid inferences from texts to the context of their use”. This technique uses codes, categories, and themes as tools of analysis. The findings were analysed qualitatively, which is in accordance with Nisbet and Entwistle (1970: 114) who claim that, “the process of qualitative analysis and discussion is based on data reduction and interpretation”. The data was transcribed and coded to discover emerging categories, themes and meaning. For example:

<b>Respondent</b>	<b>Response</b>	<b>Codes</b>	<b>Categories</b>
<b>1</b>	Well, if I may start (name omitted) I think our core function is to provide professional support by conducting workshops, by preparing materials and develop, to conduct CASS. We do school visits as well, and moderate orals and practicals, well, screening of relevant teacher support materials, eh, that’s what I am thinking off.	To provide support to schools  To provide support to schools	Positive feeling about role function  Positive feeling about role function

2	<p>I think that's our core-function, is to give support to teachers to uplift them and to check what they are doing and to check what is involved in that process, of course all the staff has been pulled out to ... . Remove us straight for evaluation (Name omitted Oh ja ...) now this year we are not allowed to select exam markers, we, if anybody knows them we know that capacity and which needs rope in and taught the ropes but they try actually to demoralise us more and more, that curriculum coming in, it will even be more worse from National for example, next year there are no guidelines on how assessment will happen next year there are now guidelines how practical subjects up to now will happen. In all Provinces there are no guidelines coming through. In Gauteng for example, all teachers are, I spent 5 days Gaunteng Province ... . I would spend the whole day- this is what is happening now, is that they don't understand that they have a huge number of rural schools and those rural schools need much more help than you DHSS and Westville Boys and Westville Girls High that... . Doing the entire Province... . This is what national cannot understand will not understand ... problems that I have experienced.</p>	<p>Checking on teachers work</p> <p>Co-functions side lined</p> <p>Staff demoralised</p> <p>Central control no guidelines on assessment</p> <p>national/province don't understand</p> <p>in-sufficient support to rural schools.</p> <p>Unrealistic scope of work</p> <p>Lack of professional support for advisors</p>	<p>Positive feeling</p> <p>Role conflict</p> <p>Frustration</p> <p>Inadequacy</p> <p>Frustration</p> <p>Inadequacy</p> <p>Frustration</p> <p>Frustration</p> <p>Inadequacy</p> <p>Frustration</p>
4	<p>Eh! Like I would like to pose a question. What is an advice? I'm asking because as (name omitted) will know as a DCES I think that I'm suppose to play a different role than as I'm</p>	<p>What is an advisor?</p> <p>Role confusion</p> <p>DCES/FES</p>	<p>Questioning role function</p>

	<p>playing now because of the shortage staff like in an ideal situation, me as an advisor (DCES), I expert work more closely with the school management team so that principals, deputy principals and Hod's can be able to manage the curriculum, that's why we are, they are there but they cannot manage the curriculum. If can focus on that maybe my other colleagues may add what ever concentrate on visiting school educators... also as a DCSE I have to make sure that clusters are formed for different learning area committees so that I can support and guide the educators in the curriculum, I think that is basically important because like now I'm doing everything. I spoke about with (name omitted) the other day, and that is the main concerned and also as a DCSE, I will make sure that Cass is monitored, you see, be Cass is not monitored in FET, Cass yah- educators do as they like because we don't go to schools, we don't really go they may be we can form clusters those than call them in a meeting – that is not happening in a GET. That is why... because there is a shortage of advisors....</p>	<p>Staff shortage</p> <p>Different role expectation &amp; understanding</p> <p>SMTs' inadequacy to manage curriculum</p> <p>Formation of LA clusters</p> <p>Monitoring of Cass</p> <p>Doing everything</p> <p>Shortage of advisors</p>	<p>Inadequate resources/support</p> <p>Role conflict</p> <p>Lack of capacity in schools</p> <p>Solutions</p> <p>Frustration</p> <p>Inadequate resources/support</p>
2	<p>I want to say I'm also a DCSE but I also do both job. Well that shows the conflict</p>	<p>Role conflict,</p>	<p>Frustration</p>
1	<p>May be for the purpose of this discussion, we have to look at it this way because when we talk of a DCES, we are looking at the deputy chief specialist, apart from being an advisor you have a management role that you suppose to employ to other peoples, we are of the notion that there are people who are below you, be it first education senior specialist or first education specialists or education specialist so that for a DCES is suppose to be 80/20 – advisor 80% and 20% management or first education specialist or</p>	<p>DCES Role clarification</p> <p>Management role for DCES</p> <p>Staff under DCES</p> <p>80% advisor and 20% manager</p> <p>FES is 100%</p>	<p>Interpretation of role functions</p> <p>DCES roles</p> <p>DCES roles</p> <p>DCES roles</p> <p>FES roles</p>

	<p>senior education specialist you are 100% specialist, you are just conducting workshop, you are doing it everywhere and then on top of a DCES we have a CES because eh although we are all called specialist, but there are other people who are suppose to have management roles over others, that's why most of the DCES's are not subject specialists per se, these are suppose to manage, for instance in our languages, for instance, I am a subject advisor of Isizulu, these will be Sbari Singh who is responsible for communication and languages because he will be managing English, Isizulu and other languages.</p>	<p>subject specialist</p> <p>Some DCES' are not specialists</p>	<p>DCES roles</p>
3	<p>I have 7seven roles as outlined between three of you and as I am senior education specialist, I have common roles you have for instance the moderating role, the screening of LSM, although that I have... first and for most I have more flexibility and we are provincial but also here (name omitted) is provincial I did not realise that.</p>	<p>7 roles common to all advisors</p> <p>provincial scope of work</p> <p>more flexibility</p>	<p>Frustration</p> <p>Positive feeling</p>
2	<p>Yes I have been an advisor for few subjects in the province, but _____ have always been provincial but when restructuring... when that happened the skills subjects were not considered at all, the people who have done this really needs to have known that music, drama and art were in the province, as we work cross regionally, because I've got only 120 schools in the whole province. I did not _____ before restructuring. Whatever letters I wrote everybody ignored until I went to Inna Cronje who called ... to do something for him and then something was done and this the type of attitude that exist with our job as it is concerned and that is sickening me I must be very...</p>	<p>Advisor for more than one subject</p> <p>Negative impact on Art subjects</p> <p>Provincial scope of work</p> <p>Re-action to restructuring</p> <p>Negative attitude</p>	<p>Frustration</p> <p>Frustration</p> <p>Problematic redeployment</p> <p>Frustration</p>

The data was analysed and reduced to the following themes:

## **4.2 THEMES**

### **4.2.1 Undefined role functions**

The data revealed that respondents have conflicting understandings of the roles of a subject advisor. Some responses show an understanding that the main function is to provide a supportive role to teachers. For example:

Respondent 1. *I think our core function is to provide professional support by conducting workshops, by preparing materials and by conducting school visits.*

Respondent 2. *Our core-function is to give support to teachers to uplift them and to check what they are doing and to check what is involved in that process...*

Respondent 4. *...I am a senior education specialists, I have common roles you have, for instance, the moderating role and the screening of LTSM (learning and teaching support materials).*

The following examples show a different understanding to the above responses. For example:

Respondent 3. *What is an advisor? As a DCES (Deputy Chief Education specialist) I think that I am suppose to play a different role than as I am playing now...I expect to work closely with the school management team, so that principals, deputy principals and heads of departments can be able to manage the curriculum...they can not manage the curriculum.*

Respondent 2. *Now this year we are not allowed to select exam makers, ...they try to demoralise us more and more.*

Respondent 1. *We have to draw our own job description. How do we do that? That is the situation I encountered when I started at Pietermaritzburg. You are a Zulu specialist, unfortunately there is no one who knows something about isiZulu, and you are the only one, and then see what to do.*

Respondent 2. *I want to say I am also a DCES but I also do both jobs. Well that shows the conflict.*

Respondent 5. *...for instance, for the whole month of September, our core function is not done because of the systemic evaluation...*

Respondent 4. *We are spreading out thin, and we are not penetrating dept we are kind of getting pulled in all directions.*

Respondent 1. *It is this obsession of National's single control; no longer do they have trust on us. I think that is a huge error, provinces should run their own exams and use their own evaluation and as we know the needs of our schools...the second thing is the lack of information coming from national...that to me is really pathetic.*

These responses indicate that there is no official job description given to subject advisors when they get employed. There seem to be uncertainty, hence there is an element of conflict when interpreting the roles and responsibilities of a subject advisor. Some responses refer to the “core functions”, but there is no common understanding of what are these functions. For example:

Respondent 3. *If there is something to be done, it has to be as yesterday. And when it comes from National, because it is National, you have to drop everything...at the expense of our core-function.*

In terms of the Employment of Educators Act 76 of 1998 ("Employment of Educators Act 76 of 1998," 1998), "The duties and responsibilities of the job are individual and varied, depending on the nature of the responsibilities attached to each post. It remains the responsibility of immediate supervisors to develop specific responsibilities and duties for each post on the basis of job content as may be applicable." The act then provides broad guidelines in section (vii) on curriculum delivery. It is likely that the confusion and uncertainty in terms of role functions arise from the act itself. Clearly the act is not prescribing any specific functions for advisors. It gives supervisors powers to decide on duties and responsibilities that advisors have to carry out.

#### **4.2.2 Negative feelings /attitudes**

The uncertainty about the role of a subject advisor seems to cause unhappiness and dissatisfaction. It is worth noting that respondents were saying that this is what they perceive to be their duties but they find themselves doing other activities they understand not to be duties of a subject advisor. From the onset, the data reflects a sense of frustration, and unhappiness about work that advisors are expected to do. For example, the following comments were made:

Respondent 4. *There is a chronic lack of capacity in the department which impacts negatively towards our performance... delivery.*

Respondent 2. *Now this year we are not allowed to select exam makers ...they try to demoralise us more and more.*

Respondent 3. *We are spreading out thin, and we are not penetrating dept, we are kind of getting pulled in all directions".*

Respondent 2. *Ideally we have to have 70 schools, but as I have the whole province and have 2 subjects, art and graphic design, it is very unfair....*

Respondent 4. *Whenever we are being appointed as a subject advisor, there is no induction...you have to swim or sink, because if you are employed you are suppose to be given a job description.*

#### 4.2.3 Effects of change/ reform/ restructuring

The term “reform” in the context of this study refers to broader political changes that led to the democratic dispensation in South Africa from April 1994. All the government institutions and departments had to implement policy reforms in order to be in line with a new political dispensation. For example:

Respondent 1. *I think it is the change of our government when it came to power in 1994, and made shift even in the mindset of people.*

Respondent 2. *A number of policies were introduced that influence our work, for instance, the Out-comes Based education (OBE).*

As part of the reforms, the DoE in particular had to embark on restructuring programme. Various former education departments that represented separate racial groups, had to be abolished and one non-racial department be established. The restructuring programme was used as one of the instruments to implement reforms that had to take place. The restructuring process, furthermore, had both positive and negative impact on personal and professional lives of subject advisors. Most of the respondents expressed deep frustration in the manner in which the restructuring process was handled and managed by senior management officials of the department. On a professional level, the following sub-themes emerged from the data: exploitation, frustration, inadequate support, and lack of buy-in.

##### **4.2.3.1 Exploitation**

Respondent 2. *We cannot give teachers enough support, too, we are getting exploited.*

Respondent 4. *As subject advisors we are not protected. Everybody is dragging us here and there.*

Respondent 2. *Yah, first of all, it's not the director that is sympathetic to us, if they have appointed who (a director) has not been a subject advisor, so he was haunting us all the time, but if they appoint someone, it should be someone from the ranks, who knows the ropes and sympathetic and should protect us.*

#### **4.2.3.2 Frustration**

Most of the respondents expressed deep frustration in the manor in which reforms were handled and managed by senior management officials of the DoE. Here are some of the comments:

Respondent 1. *'...there was a need for restructuring, but the way it was handled and implemented was wrong.'*

Respondent 5. *I am feeling very frustrated because I don't feel I am doing the job which I am employed to do.*

Respondent 1. *People were not brought on board', it was not considered that we just had the merging of all the ex-departments and everybody was not at the same level...*

Respondent 5. *We just finished NCS (National Curriculum Statement) workshops, the next thing is Systemic Evaluation workshops and the next thing is EMS (Economic Management Science) workshops, so what we are doing is just like thread-mill conducting these workshops*

Respondent 4. *...I know that subject advisors, as far as I know, are not yet officially involved with that accreditation material. I'm also involved in doing field research, which is directly related to the workshop that I am doing. I seem to have some role but some other things to do. I am avoiding frustration that you are encountering...*

Respondent 3. *There has been too many things implemented and have not been researched properly.*

Respondent 2. *The second thing is the lack of information coming from national...that to me is really pathetic.*

Respondent 1. *I used to go an extra mile to work a lot of materials, now I go for a minimum because I am totally demoralised. I am not motivated because even when you work very hard nobody will acknowledge your work.*

#### **4.2.3.3 In-adequate support**

The data revealed that there is lack of support for advisors in terms of transport, office space, and access to cell phone lines, e-mail, facilitation equipment, and shortage of advisors. For instance, one respondent is responsible for schools across the province. As a result, advisors feel inadequate to render effective support to teachers.

Respondent 5. *We are not building into the system continuous support whether, you find in the first world that teachers have to go back to do refresher courses and they have to do that in the tertiary institution, where they are offered that continuous, where teachers can come back during holidays and, that training continues their support. Teachers are expected to be certificated for planning and teaching that they have not been prepared for.*

Respondent 5. *We never stop and see how effective those workshops and to check how that information has been taken in, how are they processing, how are they implementing it, and I just think that we came right back to the number of advisors. We are too few for too many schools that you do not reach out.... the teachers are suffering because we not there give support and guidance.*

Respondent 3. *You don't have access to cellular phones.*

Respondent 4. *I must say that there has been an incredible wastage of resources, and the resources are not reaching where they should be.*

It is evident from the above comments that advisors cannot work efficiently if basic equipment is not provided.

#### **4.2.3.4 Lack of buy-in**

The responses also indicated that there is lack of buy-in, in terms of reforms and professional roles advisors have to play. The responses seem to show that there is no firm understanding and support for reforms that affect advisors.

Respondent 1. *Because, really to change, even us as facilitators, we have not accepted change as much, although for me it's very good but we were not prepared as facilitators.*

Respondent 1. *And one other thing that is very important our legacy because there were a number of ex departments, for instance, I was from the Department of Education and Training, this was HOD, this was HOR, NED, so then we came with our baggage from ex departments, so in whatever was happening there was a lot of resistance....*

Respondent 3. *I think it is the change of our government when it came to power in 1994, and made shift even in the mindset of people.*

Respondent 5. *Firstly, we needed to implement it, people were not brought on board, you know, there it was people who were selected and then go to work at National to write the curriculum and then when we were now being trained, it was not taken into consideration there are enough advisors to cascade the information*

Respondent 2. *I mean OBE is the curriculum that is utilised in other countries. We are not the first country to do it, but it has different functions but it is the way we have to do it.*

The responses allude to the fact that advisors were not involved in planning of restructuring before it was implemented. It was imposed on them, by the curriculum planners and by the senior managers, hence advisors seem to be despondent about restructuring.

#### **4.2.4 The impact of restructuring on the lives and work of advisors**

Restructuring of the work of advisors had an adverse impact on their professional roles and personal lives. It turned specialists into non-specialists. Most advisors were placed outside their areas of subject specialisation. Responses show that this impacted on the advisors and affected them on both personal and professional levels.

##### **4.2.4.1 Impact on professional level**

Respondent 3. *“You will find that a History person is placed in other units where they don’t belong.*

Respondent 2. *“So then people were placed wrongly...people stayed there and then they did not know what they were doing. That impacts negatively on their work, thus everything else”.*

Respondent 1. *“.... we do not have a Director, who is responsible for teaching and learning services, so than whatever we are trying to say, no one is listening because we are not presented up there. As subject advisors we are not protected, everybody is dragging us here and there.*

Respondent 4. *‘In-fact, for instance in Arts and Culture, so many subject advisors have been given a portfolio which they know nothing about.*

#### **4.2.4.2 Impact on private life**

Advisors were also deployed to work in areas of the Province where they will be away from their families. Restructuring and redeployment was done without any consultation or consideration of the damage it will cause to the lives of advisors. Respondents have this to say:

Respondent 1. *“... and unfortunately with this restructuring, what was negative when they were implementing it, when they were addressing us, they were trying to fix us, even the way they would argue, “ if you don’t want to go to this thing, we will send you to Ubombo”, Jah, we were threatened”.*

It is evident from the data, that there is a high degree of uncertainty of what is expected of advisors, and a clear feeling of self-doubt and personal anxiety.

### **4.3 CONCLUSION**

In this chapter I have presented the findings, using themes and sub-themes as they emerged from the data. The following chapter will present the analysis and interpretation of the findings using globalisation themes as tools of analysis.

## CHAPTER FIVE

### 5.1 INTRODUCTION

The aim for this chapter is to present the discussion of the findings. The discussion includes themes that emerged from the analysis of the findings and key reforms that have been associated with globalisation effects in education. Globalisation themes have been used as tools to discuss the findings.

### 5.2 NEW VALUE CONTEXT

The findings have shown that, according to the subject advisors, role functions of advisors have changed and continue to change from what they used to be prior to 1994. The introduction of the out-comes based education system based on the global economy and market forces meant that advisors were working within a new value context in which monitoring and management roles are more important than educational process. There are indications that the working conditions for advisors are changing from being subject experts to a not so clearly defined role. It all depends on the place where an advisor is deployed and what the manager or the supervisor deems necessary as functions at that locality and time. The lack of clear and common role functions cause a lot of anxiety. Naturally, one has to ask a question, why is this the case? The undefined role functions allude to global market influences that underlie reforms that have been implemented by the department of education since 1994. According to Dean (1995:561) in terms of the market driven economies, “the capacities, statuses and duties of individuals are problem-atised and worked on”. Bernstein (2000:193) refers to this uncertainty as “mechanisms of introjection” whereby “the identity finds its core in its place in an organisation of knowledge and practice”, that is, “an identity is a reflection of external contingencies”. The influences that shape advisors’ work are beyond their control. These come from macro political system that seeks to align education with market forces and industrial management practices.

### **5.3 PERFORMATIVE ACTIVITIES**

The findings reflect that dominant activities conducted by advisors are performative in nature. For example, Super-start, whereby they go out to schools to gather statistical information on number of learners, teachers, books, physical infrastructure, examination monitoring, systemic evaluations etc. According to Organisation for Economic Cooperation and Development OECD (1995:75) monitoring of teacher performance by advisors serves as “measures of productivity or output of quality”. For example, respondent Five puts it like this, “.... *for instance, for the whole month of September, our core function is not done because of the systemic evaluation*”. Elliot (1996:89) also confirms that the work “increases in effort and time spent on core tasks are off-set by increases in effort and time devoted to accounting for task work or erecting monitoring systems, collective performative data and attending to the management of institutional impressions”.

Blackmor & Sachs (1997) concur with this contradiction when they suggest that acquiring the performative information necessary for perfect control, “consumes so much energy that it drastically reduces the energy available for making improvement inputs”. Advisors have raised a concern that they spend most of their time doing activities that they regard as not contributing to professional support, they are meant to give to teachers. For example, respondent four had this to say, “*We are spreading out thin, and we are not penetrating depth we are kind of getting pulled in all directions*”. The perception is that the advisors expertise is being used to collect and quantify data at the expense of providing academic and curricula support to teachers.

### **5.4 ADVISORS’ IDENTITY IN A MANAGERIALISTS ENVIRONMENT**

Advisors’ identity is influenced by both the personal and professional experiences that shape who they are. Bernstein (1996) argues that the policy technologies of education reform are not simply vehicles for the technical and structural change of organisations but are also mechanisms

for reforming teachers (advisors in the case of this study) and for changing what it means to be a teacher (advisor). The *Employment of Educators* (1998) refers to advisors as “Office based educators”. Advisors are teachers by profession and are deployed to work in various offices and stations of education system and are tasked to render various support services to schools. The technologies of reform produce new kinds of teacher and advisor subjects in the case of this research. According to Rose (1989: 61) such reforms change ones, ‘social identity and our subjective existence and our relations with one another’. From the discussion of the data it has become evident that globalisation influences are reshaping roles and professional identity of advisors. Kydd (1997) argues that the rise of managerialism and the erosion of professionalism are inappropriate for education. She associates the former with market forces, business management and economic criteria, and the latter with curriculum and teacher autonomy. Kydd (1997: 116-117) further argues that ‘in the past’ ‘good managers’ in education were ‘good teachers’, however, ‘in a managerialist environment this duality is more difficult to sustain’. Teachers are complaining that they don’t get enough professional support from advisors hence learner performance is deemed to be dropping in public schools.

In order to further analyse advisor identity I will use a “three step process” as suggested by Welmond (2002: 43) in his paper titled “Globalisation viewed from the Periphery”. The three levels (schemata) together constitute the teacher- identity landscape. Level one: identifying the specific configuration of cultural schemata. This configuration defines what it means to be a teacher (advisor in the case of this study). Level two: focuses on the experience of teachers (advisors) at the local level, trying to understand how they navigate this landscape. Level three: examines the state’s education objectives and their influence on how teachers (advisors) behave and think in certain ways. Of all the forces that influence advisors the states’ objectives for education are perhaps the most determining ones.

Level one: The data, revealed that the identity of being an advisor has changed from providing professional support to teachers to being a monitor who checks if set targets are being achieved by teachers or not. As discussed above, advisors are doing more of managerial work, which, is a sign that market forces and economic criteria are reshaping education in general and the identity of advisors in particular. The political and economic landscape is reshaping advisors' work and identity from what it used to be before 1994 under Apartheid's racially segregated political landscape or schemata.

Level two: Respondents have shown mixed experiences and perceptions about being an advisor at their local district. Most responses reflected deep frustrations caused by many factors like, lack of basic resources and lack of clarity of what are the core functions. At the level of operation, advisors have less power and have subordinate status that makes them vulnerable, in terms their work. They are expected to follow the rules and work conditions prescribed by the senior management of the department without proper consultation with advisors. For example, the following comments reflect the feelings of hopelessness, *“As subject advisors we are not protected. Everybody is dragging us here and there.”* The other one is, *“We cannot give teachers enough support too, and we are getting exploited”*. Advisors feel powerless and are frustrated by what is expected from them. There is a perception of “us” and “them”, referring to advisors and management.

Level three: The head office in Pretoria has a duty of enforcing and making sure that the state's education objectives are implemented at all levels of the education system. Responses have indicated that head office has overriding powers to stop the local plans and activities, and prioritise national programmes. There are programmes and projects that come directly to districts and everything else has to stop. One respondent had this comment to make, *“It is this obsession of National's single control, no longer do they have trust on us.”* For advisors it seems they cannot escape direct control from the National Office. Power and control is not fully

devolved to provinces and districts as yet. The lack of direct control of their work situation means that they will always be frustrated by the uncertainty about the roles functions. It is clear that the work of advisors has become dynamic and evolving due to factors that are outside education but have direct and indirect impact.

### **5.5 THE ADVISOR AS AN AGENT OF CHANGE**

I have noted with concern that only two respondents have challenged the Department of Education's unjust practices. Is it because they have accepted the present status quo or because of the past oppressive history of South Africa, they have become complicit. Are they prepared to resist the prevailing status quo and to act as agents of change? Only two respondents have attempted to challenge the status quo. He comes from an advantaged and dominant white social status, which has influenced him to be vocal and to have courage to challenge authorities. We saw in his profile that he wrote letters challenging the Department of Education about what he felt was not just. He took a stand by not going where he was redeployed during the restructuring process. It seems as the Department listened to him.

A coloured female respondent also took the Department of Education to arbitration, which is a sign of challenging the unjust and unfair decision against her. Coloureds were oppressed during apartheid. As a social group coloured people still do not hold sufficient social power and privilege in post apartheid SA. In this research, we see her challenging what she regarded as unfair treatment by the authorities. She won the arbitration. It takes a lot of courage and resilience being a woman to successfully challenge the status quo in a male dominated society. She stood for her rights, which indicates that we are now all equal before the law regardless of pre-1994 social status.

African participants have not openly challenged the injustices they have experienced. Perhaps the reason for this had to do with the internalized subordinate status that might still exist within them. Henry Giroux (1996) speaks of the process of developing teachers into transformative

intellectuals that must be able to denaturalise the appearances of capitalist society. Transformative teachers (advisors in the case of this research) are sought in the context of deepening of democracy. In the main, respondents seem to be overwhelmed by the reforms that highly influenced by neo-liberal economic principles but only a few, as can be seen from the data, challenges these.

## **5.6 MANAGEMENT EXPERTISE VERSUS PROFESSIONAL EXPERTISE**

The data has indicated that advisors are involved in monitoring duties more than rendering professional support. They are engaged in quality assurance activities like, systemic evaluation; Sacmeg (International performance tool for schools), super-start and many other activities that are intended enhance efficiency and accountability in schools. All such activities impact on the traditional role of advisors of being responsible for rendering professional support to teachers. Instead, the globalisation influence is redefining the roles of advisors. The data shows that the appointment of managers and supervisors at deferent levels is leaning more towards management expertise. Respondent two had this comment to make,

*“Ja, first of all its not the Director that is sympathetic to us, if they have appointed who has not been a subject advisor, so he was haunting us all the time but if they appoint someone, it should be someone from the ranks who knows the ropes and sympathetic and should protect us”.*

This comment clearly indicates that there is a shift of focus in terms of appointing managers, it is no longer based on teaching expertise instead appointments seem to be based more on management expertise. This indicates that advisors although are specialists, it does not necessarily mean that their senior manager needs to be a subject specialist too, because his roles is to manage effectiveness and accountability of the advisors under him. According to Ball (1993: 96) the changing roles of central management rest on “monitoring systems and production of information”.

It is with these aspects of reforms that cause problems, especially, changes in attitudes and behaviours and changing roles for both office-based and school-based educators. It is ironical that despite the reforms that have taken place over the past thirteen years in South Africa, the data seemed to indicate that there was still lack of efficiency and accountability in the way advisors work. They feel frustrated and confused of what is expected of them. It was evident that the morale was low which affected their optimal professional performance. One of the questions this study seeks to explore is, “how do office-based educators (advisors) perceive educational reforms?” Responses revealed that there were mixed feelings. For example, advisors did appreciate that reforms were and are necessary given the socio-political history based on apartheid regime before 1994. All respondents agreed that reforms are necessary to correct the imbalances of the past. However they raised concerns about the manner in which the educational reforms were introduced and implemented by the senior management of the department. As highlighted in the previous chapter reforms were imposed on advisors in an in-sensitive way that had created confusion about their roles. The way reforms were implemented have alienated advisors rather than embracing them in a way that promotes efficiency. It is important to note that reforms still are continuing being implemented at this stage because this is an ongoing process that will unfold into the future.

## **5.7 ACREDITATION AND UNIVERSALISATION**

There is evidence in the data that the Outcomes Based Education is an international approach that is used by many countries in the world. Respondent four had this to say,

*“Just the new curriculum for instance, just the complexity of the curriculum itself, has a huge impact on schools, because that global curriculum and of course our teachers are unable to comprehend what is going on really, I mean at a rate that it is suppose to be known to make that link.”*

According to the Overview document (2002: 4) of the National Curriculum Statement (NCS), the vision for the new curriculum is to promote, “ a prosperous, truly united, democratic and internationally competitive country with literate, creative and critical citizens leading productive, self-fulfilled lives in a country free of violence, discrimination and prejudice.”

Accreditation goes together with universalisation. Eaton in Dunkerly and Wong ((2001) defines it to mean compliance with quality standards, mechanisms for quality assurance and strategies for quality improvement. The data has revealed that accreditation is beginning to become a norm. For example, respondent 4 had this comment to make,

*“we have to do something completely different may be coming from National (office) but I think its more to protect our jobs, we have to become accredited, an accredited institution. ”*

This comment had been made by a respondent who works for an in-service section that provides mainly in-service training to teachers within the district. This is a new direction for advisors because they also need to be trained as accredited assessors if they are to monitor and evaluate teachers’ work. The perception here is that Advisors are “de-professionalised and re-professionalised” (Seddon 1997:63) into new roles that are in line with the demands of accreditation and universalisation of education and roles for teachers in particular. The data has shown that advisors are physically and emotionally stressed by what is expected of them.

The latest development for teachers as well as advisors in South Africa is that they have to register with a professional body called, South African Council of Educators (SACE). SACE is a regulatory body that offers practicing licences for teachers as well as advisors. In a sense it is part and parcel of the professional accrediting bodies for teachers because one cannot be granted a licence to practice as teacher if his/her qualifications are not recognised by SACE.

According to Policy Handbook for Educators (2003: A-61), teacher education qualifications and programmes are subject to the same processes of registration, accreditation and approval as all other higher education programmes. In addition, publicly funded teacher education qualifications must meet the criteria laid down by the Minister of Education in the Criteria for the Recognition and Evaluation of Qualifications for Employment in Education. The main accrediting bodies in South Africa are, South African Qualifications Authority (SAQA), Sector Education and Training Authority (SETA) and Standards Generating Body (SGB).

The Organisation for Economic Cooperation and Development (1994) has defined universalisation as an international orientation in content, aimed at preparing students for performing (professionally and socially) in an international and multicultural context, and designed for domestic students as well as foreign students. The Education system and Curriculum are shaped and geared towards achieving internationally set standards that roles of subject advisor challenged.

## **5.8 INTERNATIONAL COMPETITIVENESS**

Reforms associated with international competitiveness are akin to what Martin & Carnoy (2001) described in the schooling sector as competition-based reforms. These reforms are characterised by efforts to create measurable performance standards through extensive standardised testing, for example, the Common Task Assessment (CTA's) in South Africa. The department is part of international protocols on Quality assurance bodies. Advisors are instrumental in the use of international research tools like Sacmeg. By using such tools South Africa's education is judged and rated on international standards. The curriculum is biased towards Mathematics and Science because these subjects are viewed to be most suitable for economy and the markets. The advisors that participated in the focus group interviews are responsible for Social Sciences, Languages and Arts and Culture. These subjects are not regarded as a priority in boosting the economy of our country; as a result, advisors do not get enough support from the authorities because the focus is on the Sciences. The data

revealed that the Curricula are aimed at promoting international competitiveness through a number of programmes and partnerships with international bodies and firms. Respondent 2 had this comment to make,

*“I must say I work even in deep rural schools throughout the province like Hlabisa, and telkom and various businesses, most of those schools have been equipped with computers by telkom and there are 20 computers and those kids are computer literate. They have internet as well.”*

The department has designed a policy on E-education which is aimed at promoting communication technologies like computer literacy, internet, email etc. All these developments are aimed at making our country internationally competitive. This drive to be globally competitive, negatively affects the professional role of being an advisor. Respondent’s views are that they no longer provide support to teachers, instead, they become monitors of targets that teachers have to meet.

## **5.9 PRIVATISATION**

Evidence in the data showed that there is rapid increase of programmes that are funded and sponsored by private companies, like, Telkom, The Royal New Zealand, Africa meets Africa, publishers and many more. Private companies offer schools various sponsorships and in return they get a privilege of advertising and promoting their products to learners, teachers and parents. For example, respondent five had this to say, *“Now, I mean that I am also part of a major project in Illovo, where it was a multi-media project sponsored by the Royal New Zealand”*. In this way companies gain a leverage of demanding certain conditions that will support their economic aims that will benefit the company in long term. For example, as a condition for a sponsorship, a company may demand that a school change its curriculum and offer maybe commercial or science subjects and forgo arts subjects.

In South Africa, the legislative framework recognizes the need for business to assist in funding the operations of public education institutions,

for example, the South Africa Schools Act (*SASA*) directs that a School Governing Body (SGB) must take all reasonable measures possible, including school fees, to supplement the resources supplied by the State. *SASA* requires the Education Minister to make regulations about the criteria and procedures for exempting parents from paying fees, which has been done in national regulations (Coombe & Goddle; 1996). The South African government encourages the private sector to help sponsor and support education in various ways. Some of the schools have received funding from business in various forms, for example, buildings, computers, stationary, etc. Schools are also encouraged to register with department as 'section 21'. Section 21 schools have a direct control of their funds and are audited at the end of a financial year. With this move one notices a shift of financial control from the state to schools. This move shows that education provision is shifting towards self-managing students, self-managing teachers and self-managing schools and institutions. There is a huge number of private and independent schools, that are registered with the department. Advisors have no jurisdiction to private schools.

The high involvement of the private sector in education is one of the indications that education is integrated within the international economic agenda couched within a discourse of improving competitiveness, standards and quality. Subject advisors find themselves implementing and managing these programmes to the extent where they feel that both directly and indirectly they become accountable to the private company, yet, they are not employed by those companies. In some instances, advisors have to submit progress reports to sponsors. There is a growing trend within the department of using private service providers for activities like, workshops for teachers and development of support materials. Such practices are an indication that, professional role of advisors, is being affected by market forces. The advisor becomes a monitor to go and check if the service provider is doing a good job or not. Outsourcing of support and training activities impacts negatively on the role of advisors. For example, some of the publishing companies prepare notes, supplementary materials and conduct workshops for schools that buy books from them.

Some of the teachers will not attend support workshops organised by advisors because they feel that they are not going to benefit much in terms of incentives like, attendance certificates, T-shirts and other promotional materials.

According to Stormquist and Monkman (2000) the increasing importance of the global markets, have several repercussions on formal schooling. First, criteria employed in firms for efficiency and productivity is being extended to schooling, sometimes in an inappropriate version. Secondly, focus has shifted from a child centred curriculum to economy centred vocational training. Thirdly, education is losing ground as a public good to become another marketable commodity. The state has become limited in its responsibility to schooling, often guaranteeing basic education but extracting user fees. Fourthly, teachers' autonomy, independence and control, is being reduced. To serve the technological needs of the market better, new forms of flexible training and vocational training and technical education are emerging as private offerings. Advisors find themselves pulled in all directions because of the demands that come from the market forces that are reshaping education provision in South Africa.

### **5.10 CONCLUSION**

This chapter has presented the discussion of the findings using globalisation themes as lenses to interrogate the data and the perceptions of subject advisors in determining the impact of educational reforms have had on their professional lives and work. The discussion was based on the data collected in one of the district offices that was used as a case study. As can be seen from the findings and the discussion, advisors' perceptions show educational reforms have impacted negatively on their work and professional lives. However, it came out clearly that the problem was with the implementation stage of the reforms that caused a negative impact. Reforms were necessary given the socio-political history of South Africa before 1994. The next chapter discusses at the conclusions and recommendations.

## **CHAPTER 6**

### **6.1 INTRODUCTION**

The purpose of this study was to explore, how Globalisation affects the professional lives and work of office-based educators (Subject advisors). The literature review (Chapter 2) provided insights into the close relationship amongst the variables that form pillars of Globalisation that has been used as the lens for this study. This chapter will present the main conclusions drawn from the study as well as some recommendations.

### **6.2 CONCLUSIONS**

There were two key questions that guided this study namely: (1) How, do office-based educators (advisors) perceive educational reform? (2) How has educational reform affected the professional lives and work of advisors? From the analysis of the findings in the previous chapter, I have come to the following conclusions. The data revealed that there appears to be a shift from what advisors perceived as their roles and what they find themselves being pushed to do by the directives from both Provincial and Head offices. In other words, what is perceived to be advisors roles on paper is not what is happening on the ground. This gap seems to be causing unhappiness and confusion about the professional role of advisors. Advisors' professional expectations seem not be met by the Department.

There is an underlying concern that advisors are not inducted on appointment. They are left to find their way on their own. It became apparent that advisors seem to have different understanding of the roles of an advisor. The introduction of educational reforms in 1994 did not focus on advisors' professional roles. It was assumed that they would fit automatically within the new system. The data revealed no mention of in-service training for advisors aimed at re-orientating them to understand their roles and functions in the new system. There seem to be low work moral amongst advisors because of the frustrations and lack of professional support from the senior officials of the department. The scope of work is beyond reach for some of the advisors who are responsible for

schools spread across the province. This situation indicates a shortage of advisors in some learning areas. Limited availability of resources like cars, telephones, faxes, E-mails and office space is common and has a negative effect on their work.

Restructuring of the work of advisors has had an adverse impact on their professional roles and personal lives. It turned specialists into non-specialists. Some advisors are placed outside their areas of subject specialisation. Others are deployed to work in areas of the Province where they will be away from their families. Restructuring and redeployment was done without any consultation or consideration of the damage it will cause to the lives of advisors. There seem to be no clear communication channel for advisors to communicate with the Department at a higher level, where decisions are made. Hence, they alluded to the fact that there need to be a Director responsible for advisory services.

Advisors form a critical link between the policy and classroom implementation. The lack of confidence and frustrations shown by advisors is also affecting teachers who rely on advisors for their professional development. Responses suggests that curriculum change is impacting on the way advisors work, and the changes are as a result of globalisation forces that are in play at macro level of our country's political and economic systems. My conclusion is that the role and functions of advisors need to be reviewed and redefined in order to minimise the negative impact currently experienced by advisors.

This was a case study of one district, but perceptions expressed by the respondents are general and not particular to the district where they belong. Most of the concerns are systemic and derive from a macro level rather than being particular to the district used as a case study. This serves as an indicator that maybe, even with other districts, advisors have similar perceptions about their work. This study reflects that advisors perceive educational reforms as important and necessary but are frustrated by the implementation process. Their feeling is that they were treated

unprofessionally. They feel left out and exploited by being used for non-professional duties because they regard themselves as subject specialists.

### **6.3 RECOMMENDATIONS**

The following recommendations are made with the hope that some of the concerns reflected in the previous chapter could be alleviated.

#### **6.3.1 Survey on advisor attitudes**

In order to fully understand, how does globalisation affect the professional lives and work of advisors, a national or provincial survey can be used to find out the nature of advisors attitudes and perceptions before an appropriate management programme is designed. This is necessary to identify and measure the sources of negative perceptions that exist in this case study. The survey may provide a useful insight to “reform” managers on how best to help and support advisors.

#### **6.3.2 Revised job description**

There is a need for the Department of Education to provide clear guidelines on the roles and functions of the job description for office-based educators (advisors), because the scope of reforms demands new roles and functions. Obviously, the department has to consult with advisors, labour movements and other stakeholders in order to create working conditions that will be conducive to advisors. Findings show that respondents are not clear of their job description any more.

#### **6.3.3 Induction/ re-orientation programme**

The other critical area that needs to be initiated is an induction and re-orientation programme for advisors. The induction programme will empower and equip advisors with skills and knowledge required for the roles and functions of the critical position they occupy as a support unit to teachers. Re-orientation programme will help instil professional confidence and reduce anxiety levels that currently exist amongst advisors, as indicated in this study. It will help refocus the professional practice from being school based to being office based. The working environments

between a school and an office are not the same although at times they may look similar. It is therefore imperative that the local district management facilitate both induction and orientation programmes especially for the newly appointed advisors.

#### **6.3.4 In-service training programme**

In conjunction with the induction programme, there needs to be continuous in-service training programme. The in-service training is crucial for advisors, because many educational reforms are taking place in the country and globally. Globalisation is affecting education, therefore, advisors have to adjust and retrain in order to be in line with the demands that require different approaches to what they are used to do. In-service training will assist to reduce stress and frustrations that advisors suffer at this point.

#### **6.3.5 Creation of Teaching and Learning Services (TLS) Directorate**

Communication channels have to be improved by creating a directorate for advisory services at National as well as in Provinces. The directorate would be able to focus all operations that advisors engage in, and would give support and leadership at a senior level. At the moment there seem to be no senior office that advisors can approach with confidence to address their concerns. At the moment subject advisors belong to a sub-directorate known as Teaching and Learning Services (TLS).

#### **6.3.6 Employment of more advisors**

The department needs to employ more advisors and each advisor be given a manageable number of schools, for example, 30 schools. This would improve the quality of support advisors render to schools. At the moment advisors in this case study are responsible for over 500 schools each.

#### **6.3.7 Provision of adequate resources**

The other area that needs to be addressed is availability of resources. There need to provision of adequate basic resources an advisor need in order to be effective in his work, for example, office, car, telephone, email, fax, etc. These basic tools are crucial for advisors to communicate effectively with

teachers at all times. Provisioning of physical resources require sound budgeting of the finances available. This is the area where the Provincial office and District offices have to provide and maintain resources.

#### **6.4 LIMITATIONS**

This was a case study of one District office in KwaZulu-Natal. The findings are based on a small sample of advisors. The very nature of a case study limits a possibility of generalising the findings. However, the findings in this study do provide insights that seem to indicate that challenges facing advisors are not limited to the case study. There is a need to do more research on Office-based educators (advisors) because at the moment this area is under researched, yet, it is an important link between teachers and curriculum designers.

#### **6.5 CONCLUSION**

Finally, further research should be taken on a larger scale in order to come up with solutions that could help advisors to cope better amidst educational a range of reforms that are highly influenced and shaped by globalisation forces.

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## **APPENDIX A**

**Permission letter from the department (to be attached)**

## APPENDIX B

### QUESTIONNAIRE

**Topic: How does Globalisation affect the professional lives and work of office-based educators: A case study of Pinetown District Office in KwaZulu-Natal.**

*Please fill in the questionnaire and return it as soon as possible. The information provided will not be used for any other purpose other than this research and will be kept confidential. Should you wish to provide additional information, please use the page attached at the end of this questionnaire. I wish to thank you in advance for making time to answer this questionnaire.*

- This questionnaire has 2 sections. (A & B)
- Place an X in the block, where necessary, that best reflects your view of each of the items.
- A short explanation is required for some of your responses.

<b>SECTION A: STAFF PROFILE</b>
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1. Gender

F	M
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2. Population group (required for purposes of representation)

African	
Indian	
White	
Coloured	
Other	

3. How many years have you been working as an office-based educator?

1-5	5-10	10 -30
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4. What is your current position?

First Educ. Specialist (FES)	
Deputy Chief Educ. Specialist (DCES)	

<b>SECTION B: JOB DESCRIPTION (DUTIES AND ROLES)</b>
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1. Do you have an official job description for your position?

Yes	No
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2. What do you think is the main function of your work as a subject advisor?

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3. Does your work involve the following :

	Yes	No
Providing support to educators		
Monitoring of Examinations (Matric and other grades)		
Participating in dept. programmes like, super-start, IQMS etc.		
Involvement in school management issues.		

4. What are your views about subject advisors conducting activities like Head count, Super start, IQMS etc.

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5. According to your understanding, what is your role as a subject advisor?

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6. Is the work that you are doing matching what is expected in terms of your job description?

Yes	
No	
Not sure	

7. Explain your response

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8. Are there any tensions between what you understand your work to be, and the actual things you are required to do? Explain and give some examples where possible.

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9. What challenges do you experience personally in your role as a subject advisor?

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10. From your perspective, what are the major education reforms that have impacted on your work as a subject advisor since 1994? How do these changes make you feel?

Positive	Negative	Neutral
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11. Explain your response

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12. How have these reforms affected your professional life and work, generally?

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## **APPENDIX C**

### **FOCUS GROUP MEETING**

**VENUE: EDGEWOOD UKZN CAMPUS      DATE: 5 OCTOBER 2007**  
**FACILITATED BY: TC NGUBANE**

### **AREAS OF DISCUSSION**

#### **1. THE WORK OF A SUBJECT ADVISOR**

- In an ideal situation, what would you see as the work of an advisor?
- How does this differ from what you really do?
- What do you think are reasons for this?

#### **2. FOCUS ON EDUCATIONAL CHANGE**

- What are the most significant changes that have happened over the past ten years?
- What are the causes of this change?
- How have these changes impacted on your work?
- How do you feel about these changes?

#### **3. FOCUS ON POLICY**

- What policies have affected your work, practice and professional life as a subject advisor?
- How have these affected you and your work?
- What is your understanding of the need for these policy changes?
- How do you feel about these changes?

#### 4. MAJOR INTERNATIONAL INFLUENCES IMPACTING ON EDUCATION

- Are you aware of any international developments that are affecting South African education? What are these?
- How are they impacting?
- At what levels in education?

THANK YOU!

**APPENDIX D**  
**Letter of request to conduct a study (to be attached)**