

THE ROLE OF TEACHER UNIONS IN EDUCATION WITH SPECIFIC REFERENCE TO SOUTH AFRICA

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ABSTRACT

The role of teacher unions in education is of utmost significance. The state alone cannot achieve everything in the field of education in a country. The support of interested stakeholders in education, such as teachers is therefore desirable.

Teacher unions as organised labour or pressure groups in education are legally constituted to play meaningful roles in education, especially with regard to bargaining for teachers and ensuring quality of education by means of engaging teachers in improving teaching approaches and maintaining a high standard.

This paper is therefore focused on the extent to which teacher unions improve the quality of education or not. This paper makes use of mixed research method. Structured questionnaires and focused interviews will be employed in the investigation of this topic. Conclusions include inter alia, that teacher unions and the Department of Basic Education must strive to have a working relationship at all times in terms of curricula teacher development and policy matters in South Africa.

Key words: teacher unions, teaching and learning, collaboration and anti-corruption

INTRODUCTION

Teacher unions are intended to work in partnership with the Department of Basic Education (DBE) for the melioration of education through the involvement of their members to take part in many departmental endeavours in improving the quality of education. However, this is mostly contrasted by the adversarial relationship between teacher unions and the DBE as teacher unions continue put excessive demands to the Department that could not accede to. It would be ideal for the DBE and teacher unions as major stakeholders in education to find common ground and that the two bodies work together for the good of education. Teacher unions must do much in convincing the public that they have much to offer for the advancement of education in South Africa. As such, teacher unions have been reduced to fight for the rubbles in a crumbling occupational space with limited scope and energy towards shaping education

Conceptual Framework

There is no generally agreed definition of what exactly constitutes the concept, *education*. Page (2001), as cited in the *Review of Educational Sector Analysis in Burkina Faso (1994-1999)* offers a relatively comprehensive explanation of education as ‘the training of people with a view to impart intellectual or manual skills and development of physical and moral qualities’. This explanation is taken as the operational definition of this research paper. On the other hand, the United Nations presents education as a right which implies that every country is obliged to provide. It therefore becomes incumbent on stakeholders in education such as teacher unions to monitor the state so that education is provided in a fair and equitable manner in line with the laws of a country (<http://www.un.org/en/globalissues/briefingpapers/efa/17/08/2016>).

In the same vein, *quality* as a concept has always been a contested issue among learners and scholars of educational studies, politicians, education specialists and policy makers. All definitions offered by the scholars from different realms appear to be valid as they apply to the varied contexts. In education, quality delineates the concept of learning as what is generally accepted as right or something of good standard or something perceived to be good based on reasonable grounds. Fredriksson (2004:4) postulates quality education as, “the education that best fits the present and future needs of particular learners in question and the community in question, given the particular circumstances and prospects”. This therefore makes the role of teacher unions ideal to ensure that the learners accomplish their mission (learning), and that teachers act in accordance with their professional calling in ensuring that there is meaningful learning and teaching in a didactic situation. Furthermore, democracy and human rights must as a matter of fact be understood as the hallmark for quality education (Fredriksson, 2004:4). Teacher unions, through collective bargaining, have the ability to compel the employer (DBE) to play both its fiscal and legislative roles in education (Cowen & Strunk, 2014:1).

Outline of the History of Teacher Unions in South Africa

The roots of teacher trade unionism can be traced back to 137 years ago when the Native Educational Association (NEA) was formed in 1879 (Govender, 1996). The establishment of the NEA was a response by black teachers who sought a collective approach to address common problems that affected them as a result of

the historical economical marginalization of black educators. However, the nature of teacher unions at the time and during the apartheid era reflected a deeply polarized society. Teacher unions were formed along the existing racial and linguistic divisions. As such, teacher unions that were later to develop in the post-apartheid South Africa retain the complexion of the historical character of the political culture of the period before the dawn of democracy in 1994.

There are currently three main trade union actors in the South African education terrain and their existence is guaranteed under Section 23 of the South African Constitution of 1996. These include the South African Democratic Teachers Union (SADTU), the South African Teachers Union (SATU) and the National Professional Teachers Organization of South Africa (NAPTOSA). Other teacher unions include the Professional Educators Union (PEU) and the Natal African Teachers Union (NATU). Both SADTU and NAPTOSA (combined trade union) are predominantly black teacher unions with a membership of about 75% black teachers each (Heystek and Lethoko, 2001:224-227). Meanwhile, SATU is dominated by Whites (90%). Though all these unions have more or less similar objectives, their policies and ideological orientations differ. The central issue among all the teacher unions is the struggle for better working conditions of their members. Nkomfe and Moll (1990) state that SADTU openly identifies itself with the political agenda of the ruling African National Congress (ANC). Its umbrella body, the Congress of South African Trade Unions (COSATU) is a member of the ANC-tripartite alliance and SADTU owes its formation in 1990 in support of the ANC.

The different policy positions of the South African trade unions should be understood in the context of the history of liberation in this country. As the teacher unions mainly align themselves with brands of political economic positionism in relation to power, money and liberation struggle. When SADTU was established, principals (heads of schools) were excluded because they were perceived as apartheid collaborators. NAPTOSA provided a unionist home for those principals, disgruntled SADTU members and others. In the same vein, white teachers identified SADTU with the ANC-led government and many of them sought an alternative in SATU. Despite the multiplicity of teacher unions in South Africa, NAPTOSA, SATU, NATU and PEU have proved to have a point of convergence on many educational matters and they have a collaboration agreement (Govender, 1996).

In retrospect, SATU and NAPTOSA claim that their main concern is the professional element of teaching as a career and they have since lost their taste for industrial action, in favour of negotiation and mediation as dispute settlement measures. On the other hand, the membership and culture of SADTU reflects the features of “*toyitoying*” (*engaging in strike action*). If the employer, the government in this case, does not meet their demands, they are quick to embark on strike action, with little regard to how such action will impact the performance of learners. Unlike other teacher unions, SADTU is overshadowed with “unionist functions” and the “professional function” is secondary to its course (Heystek and Lethoko, 2001:224-227).

Educational Reforms and the role of Teacher Unions

The recent literature on educational studies offers contrasting views on the role of the teacher unions in the improvement of the standard and quality of education. Cowen and Strunk (2014:10-12) argue that teacher unions have political and legislative influence on educational policy that favours their members and their perceptions in issues that relate to educational matters. For example, in South Africa, teacher unions were instrumental in influencing teacher performance management development system (PMDS) which has direct influence on teacher salary progression.

Astonishingly, the role played by the teacher unions, especially with regard to educational reform, is bleak. In contrast, the view that teacher unions are preoccupied with the well-being of their members, instead of the educational interests, is dominating both in historical and contemporary literature on education (Fullan, 1998). Bascia (1998) shared a view of many scholars of educational studies when she argued that teacher unions are conservative institutions that are more concerned with teachers’ wellbeing, which has a tendency of alienating the educational interests of the learners. This implies that primary issues of concern to the teacher unions become those aspects centred on the material and working conditions of their members. However, there are those professional issues that teacher unions engage in with a prime target of improving the professional standing of teachers, only to find that meagre benefits trickle down to learners. For instance, Bascia (1998) contends that in both Canada and the United States of America, teacher organizations have a shared concern over the so called “bread and butter issues” and professional issues. Professional issues entail the broadening of teacher’s roles, capability and capacity to meet the needs of the learners.

Barber (1996:171-194) is of the opinion that teacher unions do not specifically respond by addressing educational crisis. To a large extent, the unions are concerned with more general labour issues which cut across

the whole world. According to Barber (1996:171-194) the technological revolution and redefinition of the concept of 'work' make it difficult for the teachers to seek solutions relating to their sector from non-educational labour unions (Leithwood & Menzies, 1998:324-46). However, Vaillant (2005:5-8) emphasises the fact that the support of teacher unions is extremely important in championing educational reforms.

In the midst of all the challenges, teacher unions have crucial role to play with regard to educational programmes, policies and reforms. In fact, the unions are responsible for the coordination of their members and there is no educational policy that can succeed without sufficient consultation with the teacher, who is the person who deals directly with the daily encounters of the classroom situation. Teacher unions are well resourced, owing to the fact that they receive subscription fees from their members. As a result, they are a structured and organized labour force and can play a meaningful role in the formulation and implementation of policies focusing on the educational sector. Bascia (1998) espoused this idea when she noted that teacher unions' contribution towards policy formulation and amendments is largely unseen because of the perception of the media and scholarship that their intentions contravene positive steps towards good educational development. As a matter of fact, across the globe, teacher unions have received little media attention, except when they are at logger-heads with the state, especially on salary increment and related benefits (Leithwood & Menzies, 1998:324-46).

Generally, teacher unions are perceived to be antithetical to educational change and advancement. Carlson (1992) conducted a study that paints a negative image of the teacher unions in the context of education reform. His research findings showed that in the United States of America (USA), a local teacher union rejected proposals for contractual provisions that introduced staff development programmes that were meant to enhance the teachers' understanding of the curriculum and to unleash their full potential in the execution of their duties. This conduct is not peculiar to the teacher organization cited by Carlson and it is not exceptional to the USA. In South Africa for instance, there has been resistance from the teacher unions whenever the (DBE) introduced a new curriculum (Masumbe and Cotzer, 2006: 208-228). For instance, under the then Minister of Education, Sibusiso Bengu, the Department of Education (DoE) introduced what is popularly known as the Outcomes Based-Education (OBE). Both Kader Asmal and Naledi Pandor, subsequent ministers of Education respectively, took the idea of OBE forward and this was further moulded into the National Curriculum Statement. In this context, the South African Democratic Teachers Union (SADTU) rightly opposed the OBE in practical and ideological terms arguing that the teachers were not ready and prepared to teach the new subjects and could not cope with the new teaching methodologies. Thus, one notes that an imposition of educational reform, no matter how well meaning it may appear, will achieve little result if it is not supported by teacher unions. Similarly, by and large, teacher unions robustly opposed the implementation of whole school evaluation, and guarded their members from inspection by whole school evaluation school developers (usually referred to as school inspectors). To date, evaluation of schools by means of Whole Evaluation, seems to be gradually losing impetus as it continues to meet stiff opposition in some schools by teacher union members.

It should be noted that in the South African case, the SADTU and other teacher unions are represented in the advisory bodies for the DBE. Therefore, they are consulted in one way or another during the planning processes of the educational policies. It is therefore safe to argue that SADTU and other trade unions play a protectionist role when they encounter the "not so user friendly policies" being promulgated in the educational setting. This can be blamed on the fact that the roles of the active union members are dominant over those of the less active of their fellows. Interestingly, there are some arguments that teacher union members are encouraged to take up defiance campaigns against the DBE from their headquarters offices. It needs to be pointed out that the origin of political parties in South Africa is born out of the struggle against the Apartheid system, so even today, the defiance character of teacher unions remains (<http://www.sadtu.org.za/docs/webcontent/2016/sadtu-book.pdf>, accessed, 20/08.2016). This presents a mammoth task for the teacher unions to play a meaningful role towards the reform process. The fact that teachers sometimes, through their teacher unions, refuse to perform contractual duties hinders their participation in the planning and execution of new curriculum models and this backfires during the implementation stage when teachers resist assuming new duties (Fullan, 1998).

In the analysis of the role of teacher unions in education reform, Barber (1996:171:194) establishes a nexus between the trade union function and professional function. She powerfully asserts that there is compelling evidence that the two aspects are integrally related. In other words, the success of the trade union role depends on the achievement of professional goals and vice versa.

The Impact of Teacher Unions on Learner Performance

In most industries, the effect of labour unions on productivity is mixed. Teacher unions are not immune to these complexities. Eberts (2007) empirical study conducted in the USA inferred that the effect of teacher unions on learner achievement is also mixed. However, in the education sector teacher unions do not necessarily shape and alter the quality of learner performance. Nevertheless, teacher unions influence the effectiveness of schools, which is one of the prerequisites for the betterment of learner performance. This is achieved through teacher unions' agitation for smaller teacher-learner ratio and through learner centred than content focused teaching (Cowen & Strunk, 2014:3-5). Drawing lessons from numerous studies on the impact of teacher unions on learner performance, Eberts (2007) maintains that there is no obvious answer in this regard. To this end, the academic progress and development of the average-achieving learners in union schools could be slightly retarded when union members refuse to carry out their contractual duties of teaching. "Catch up" (to catch up on lost days of teaching and learning) campaigns undertaken by teacher unions and DBE have failed dismally. On the other hand, lower and higher achieving learners tend to do better in non-union schools.

Contextually, there is a consensus among the scholars of educational studies that teachers have the potential to effect changes to educational outcomes for the learners. A central conundrum among them relates to the specific teacher attributes that can turn around the performance of the learners. It is in this context that the unions' bargaining role becomes important. However, Johnson and Donaldson (2006) find the contradictory evidence as to whether the quality of teachers has improved as a result of collective bargaining. The notion that collective bargaining is the key to better learner achievement is based on the premise that better wages and salaries and good working conditions attract the best crop of educators (Loeb and Page, 2000:393-408). In the same vein, Van der Berg (2007:849-880) also argues against this misconception that pumping money into education would automatically improve scholastic results. Rather, emphasis must be on recruiting and developing dedicated cadre of teachers whose commitment to teaching is without question.

Mutual Partnership between Teacher Unions and Government

Fredriksson (2004:4-5) indicates with empirical evidence that, perhaps, it would be useful for the teacher unions to fully articulate on the working environment of their constituency and develop the education system in the long run. On the same score, using Ghana as a case study, Fredriksson, (2004:17-18) advocates for a strategic partnership between the governments and teacher unions as the epitome in improving quality of education. This partnership should be grounded on shared responsibility, wherein both parties can identify each other's roles. For instance, according to Fredriksson, (2004:2-11) teacher unions can ameliorate the quality of education by:

- Promoting an interest among teachers and other education sector employees in improving their work;
- Cutting unreasonable teacher absenteeism; and
- Attracting projects that will improve the quality of the education.

Equally important, Fredriksson (2004:12) provides a unionist perspective that dictates that the government can improve the quality of learning and teaching by giving sufficient attention to the following areas: salaries, teacher education and working environment in schools. This can only be possible if there is rigorous mechanism for engagement and consultation between the teacher unions and the DBE. In some cases, the relationship between the DBE and teacher unions becomes strained as a result of not agreeing on an acceptable strategy to be undertaken. This point is illustrated by the continual strife, from about 2012 till 2016 in which five major teacher unions refused to allow teachers participate in the Annual National Assessments. While the Department views these tests as essential, teacher unions view them as a waste of time because they simply point out the inability of learners to cope with scholastic work and that little is being done by the DBE to address this anomaly and to undertake curricula empowerment programmes for both learners and teachers (Govender, 2015). In the opposite, a cordial working relationship between the DBE and teacher unions could yield positive spin-off in education and help to halt increasing drug use and violence in schools by learners, great absenteeism by teachers, and facilitate fair attitudes by both learners and teachers toward school work.

Waging a War against Bad Governance / Corruption

The problem of how to effectively and efficiently address the problem of corruption in the education system boils down to how to secure the support of the teacher unions in this regard. According to Thabo Mbeki as quoted by Rankhumise and Shai (2007), "corruption is the sufficient condition that entrenches poverty and negates development". In the same reasoning, corruption has the potential of compromising the quality of education in South Africa and elsewhere. It is therefore, important for the teacher unions to take a leading role to combat and arrest the escalation of corruption levels in the education sector. Fredriksson (2004:17-18) observed that trade unions have laid a fertile ground for implanting anti-corruption mechanisms. For instance, most trade unions conduct workshops on trade unionism and related matters. As such, an item of anti-corruption could be added to their programmes for in-service training for the members as part of the professional ethics. In the final

analysis, teacher unions can lobby for the integration of anti-corruption mechanisms and instruments which could be vital in governance of education. However, it is disconcerting to read reports of escalating corruption by the dominant teacher union, SADTU which is engaged in unfairly and unscrupulously promoting their hand-picked candidates in return for payment (Masondo, 2014).

Advancement of the Culture of Learning and Teaching

Teacher unions are at the centre for the restoration of teacher professionalism and the culture of learning and teaching (Heystek & Lethoko, 2001; Ratteree, 2004); Kerchner, Koppich & Weeres, 1997). Educationists (Heystek & Lethoko, 2001:224-227; Ratteree, 2004:146); Kerchner, Koppich & Weeres, 1997) succinctly argue that in the constituency of the education organizations, teachers occupy a crucial part: teaching. Therefore, success with regard to the enhancement of the culture of learning and teaching largely depends on the active participation of teacher unions on the entire process. It is therefore significant for the teacher unions to motivate their members to commit themselves to the provision of quality education against all odds.

However, factors that encourage and discourage teachers to unleash their full potential for the benefit of the learners cannot be over-looked. In relation to this, Heystek and Lethoko (2001:224-227) opined that the teacher unions must draw lessons from the education situation (practice) in their attempt to improve the level of education. However, instilling a professional code of conduct among the teaching corps cannot be left to the teacher unions alone. As a matter of fact, the enforcement of professional teacher conduct must be enforced with the full support of the Public School Government Bodies (PSGBs), Learners Representative Council (LRC), Department of Education and other stakeholders with an interest in educational matters. Lastly, teacher unions should make incentives in the form of awards (of recognition) for the best performing teachers in order to encourage them to excel in their work.

Research Methodology

Mixed research methods were used wherein both qualitative and quantitative research approaches are used. Mixed research methodology has an advantage that where there is lack of clarity in the interpretation and analysis of results by one research method, an additional research method provides another perspective which the other research method does not provide. Quantitative research method makes use of figures and questionnaires in generating information. On the other hand, the qualitative approach makes use of interviews and observations in generating data (Sarantakos, 1998).

In the quantitative research methodology care was taken that the questionnaires were piloted in order to increase credibility and the validity of the research. Anonymity and the right to participate in the research by the participants was outlined and guaranteed. The sample size of five schools which were selected in an education district reflects a reasonable number of schools for this article, and 138 participants responded to the questionnaires which is an acceptable response rate with 150 teachers requested to fill in the questionnaires.

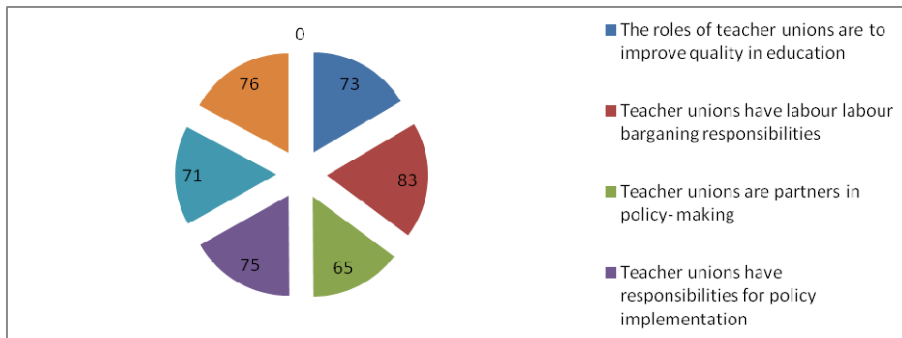
In the qualitative research, focused interviews were conducted in an open and free atmosphere that generated trustworthiness and credibility of the research as care was taken that the researcher engaged the right people who were knowledgeable of trade union matters as they related to their unions. The importance of interviews is underlined by Gay (1992:231) by stating that an interview “is most appropriate for asking questions which cannot effectively be structured on a multiple-choice format, such as questions of a personal nature”

The research was conducted in five high schools of the Tshwane South District of the Gauteng Department of Education (GDE). Five schools were randomly picked from a pool of the District schools. The schools were urban in nature and each school comprised of a reasonable number of teacher union members belonging to different union groups. The structured questionnaire was distributed to teacher union members who volunteered to fill in the questionnaire. In total, 138 questionnaires were received and analysed using Excel computer programme. Focused interviews were conducted with teacher union members who performed in administrative/managerial capacity. Four focused interviews were conducted with two of each of the dominant teacher unions (SADTU and NAPTOSA).

The Results and Analyses of the Research

The results of this research indicate by high percentage scores (achieved by adding *highly agree* and *agree* scores) that the majority of teachers irrespective of membership association state that:

Graph A: Roles and Responsibilities of Teacher Unions

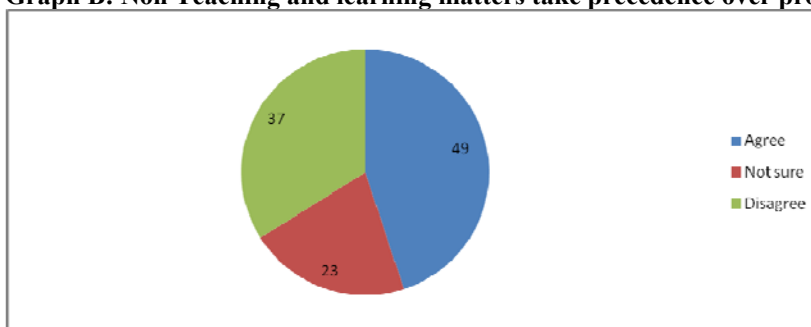


The roles of teacher unions are to improve quality in education with 73% approval rate; Teacher unions have professional responsibilities with 83% agreement; Teacher unions are partners in policy-making with 65 % approval rate; Teacher unions have responsibilities for policy implementation with 75% agreement; Teacher unions are instrumental in the functionality of schools with 71% agreement, and Teacher unions’ highest preoccupation is teacher rights with 76 % approval rate.

The literature reviews presented in this article support the notions that indeed, teacher unions contribute to the quality of education (Fredriksson, 2004), deal with professional matters which affect teachers (Bascia, 1998) and they are also partners in policy formulation. Furthermore, there is concurrence in literature reviewed that teacher unions receive less attention when they deal with educational matters than when they are at loggerheads with the state, especially on salary increment and related benefits. Likewise, Heystek and Lehoko (2001;224-227) argue that teacher unions are instrumental in the facilitation of teaching and learning in schools. This in turn implies that teacher unions are partly engaged in the implementation of education policy, in this context, which relates to teaching and learning. But this viewpoint is contrasted by teacher actions in agitating against the implementation of outcome-based-education and whole-school evaluation in schools. In addition, the results of the research for this article support the assertion that teacher unions’ main preoccupation is with teacher rights rather than professional matters. Indeed, teachers primarily pay their membership fees in order to be protected in cases of labour disputes with the DBE.

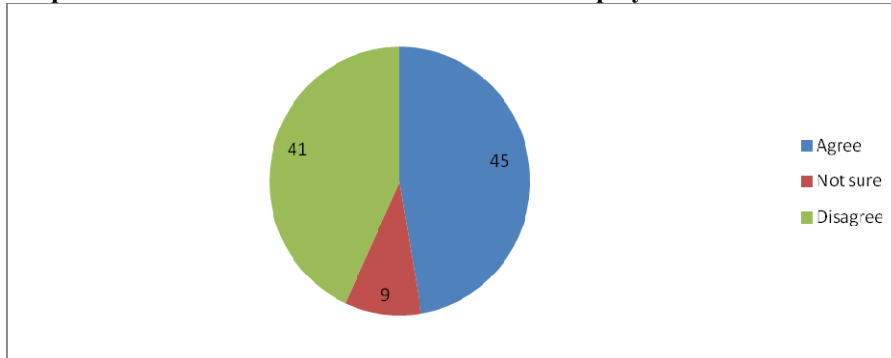
On the other hand, the results show (see the graphs: B, C, D & E) with relatively reduced majority (by participants) of percentage scores. Teachers unions either confirm (adding *highly agrees* and *agrees*) and disconfirm (adding *highly disagrees* and *disagrees*) the following statements:

Graph B: Non Teaching and learning matters take precedence over professional issues



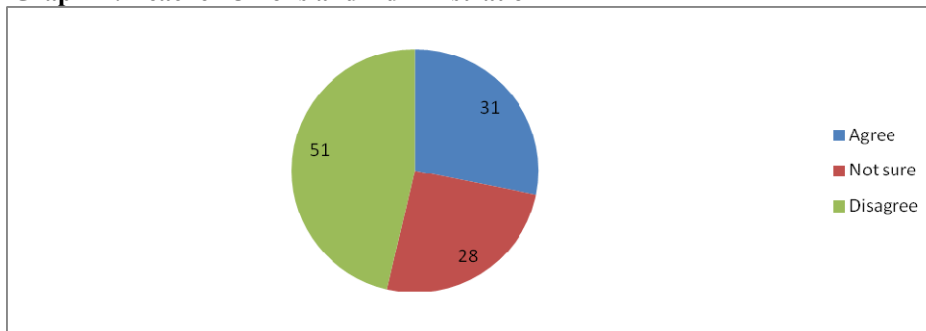
There is slight majority by participants that in most cases, non-teaching and learning matters take precedence over professional issues (Graph: B) with 49% agreement, 37% disagreement and 23% of the participants being neutral. This is supported by literature review in that the primary task of teacher unions is to protect teachers’ rights. Their other functions are of a secondary nature.

Graph C: Teacher Unions and Conflict with the Employer



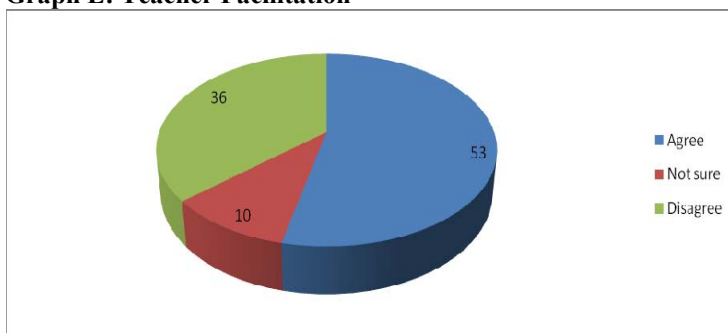
Teacher unions are bound to be in conflict with the employer (Graph C) with 45% agreement, 41% disagreement and 9% not being sure. The fact that teacher unions always strive to bargain for their members even on matters which are of a professional nature, such as having problems over the implementation of OBE and WSE support the statement that teacher unions are bound to be in conflict with the employer.

Graph D: Teacher Unions and Administration



Teacher unions are a hindrance to the administration (Graph:D) of schools with 31% agreement, 51% disagreement and 28% not being sure. The disagreement by teacher unions that they are not a hindrance to the administration of schools indicates their desire to work in harmony with the employer although they often find themselves being in conflict with the employer over bread and butter issues which are critical for the well-being of their members.

Graph E: Teacher Facilitation



Teacher unions facilitate easy administration (Graph: E) of schools with 53% agreement, 36 disagreement and 10% not being sure. The affirmation of the statement that teacher unions facilitate the administration of schools is in line with the preceding paragraph which states their wish to work in harmony with the DOE in matters which affect teaching and learning.

In the interviews, NAPTOSA indicated that their preoccupation was to bargain with the Department of Education in the interest of education in general and of their members in particular. They also indicated that they are engaged in collaborative efforts for the training of teachers in workshops with regard to curricula and policy matters. They indicated that they engage with the Department to allocate them money so that they could

undertake the training of teachers by way of workshops and other means which could be identified. NAPTOSA officials indicated that strikes and withholding of their labour is the last thing they should embark on as they strive by all other possible means to have good relations with the DBE. While SADTU officials also mentioned that in training of their members and keeping them up-to-date with professional matters they could not dissociate themselves from embarking on strikes whenever they felt that their members' rights were being infringed. One SADTU official stated that 'the strike has the potential to make the employer to listen to our grievances'

Discussion and Conclusions

The results of this research indicate the desire of teacher unions to contribute to quality education, to be partners in policy formulation with the DBE and also actualize policy implementation in schools. This is in line with the professional calling of teachers which demands for their professional ethos in the carrying out of their duties. However, this stance is often compromised by the instruction of teacher unions directed to teachers to defy certain actions or policy implementation programmes imposed by the DBE. This is certainly bound to be a conflict of interest between teachers as individuals who feel duty-bound to obey instructions from the DBE and teachers as members of teacher unions who are bound by collective bargaining to support defiance campaigns by teacher unions against the DBE.

This conflict of interest is indicated when some teachers defy instructions of defiance by their teacher unions against the state. This approach becomes justifiable when teachers view themselves first as part of the state and thus bound by citizenship to contribute to the welfare of the state. On the opposite side, teachers find themselves being taken for granted by the state which is generally reflected in unfriendly approaches to the teachers in terms of unfavourable working conditions and scanty employee benefits. As a result of this, teachers find themselves having to look to teacher unions for protection against the state.

It becomes necessary that the state, through the DBE, must always strive for cordial relationships with teacher unions so that in return teacher unions would support the DBE in its endeavour to achieve quality education by means of well designed curricula and effective teaching and learning approaches.

The DBE must strive to engage teachers unions in a constructive manner all the time and involve them in decision making rather than as in most cases pronouncing certain policy positions as non-negotiable with teacher unions.

The DBE and teacher unions must jointly undertake tailor made training programme and mentoring programme to serving and to novice teachers respectively as a means of building a dedicated crop of teachers.

Teacher unions on the other hand must realize that their actions cannot always be antithetical to quality education as frequent strikes by teachers have tendency to sacrifice the quality of teaching and learning.

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