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What teachers think about teacher unions: a stratified probability survey of central Gauteng teachers

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What teachers think about teacher unions: a stratified probability survey of central Gauteng teachers

A research report

submitted by

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For The School of Education, University of Witwatersrand, in partial fulfilment of the requirements of the degree of

Master of Education

13 February 2015

Formal Declaration

I, Cheryl Leigh-Anne Siewierski, hereby declare that:

a) This report is my own work, developed under the supervision of Professor Brahm Fleisch at the University of the Witwatersrand;

b) No part or substance of this report has been previously submitted for publication or degree and/or examination at either the University of the Witwatersrand, or any other tertiary institute;

c) All information collected for and used in this report was obtained whilst in the permanent employ of *The Independent Institute of Education*, a division of the ADvTECH Group.

Signed: _____

Cheryl Leigh-Anne Siewierski

On this _____ day of _____ in the year _____

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- Christopher Siewierski, who helped me to eat the logistical 'elephants' of this report, one bite at a time.

Abstract

Historically, qualitative literature and media reporting reflect the notion that teacher unionism in South Africa is an exercise in polarities: with one larger form of militant teacher unionism represented by SADTU focusing on teacher benefits and employing any means necessary to obtain its goals, and another, more 'restrained' form of teacher unionism represented by the NUE and SAOU which demonstrates a greater concern with professionalism and teacher development.

There is, however, little reliable, generalisable evidence that this 'either/or,' militant vs. professional unionism is, in fact, the experienced reality of those most directly affected: South African teachers themselves. As a result, the seemingly patent unionist vs. professional union 'archetypes' that pervade media reports and qualitative literature are difficult to confirm or reject.

In an attempt to contribute to the quantitative literature on teacher unionism in South Africa, this report describes the perceptions and opinions of 288 central-Gauteng teachers, who represent three of the largest South African teacher unions. A quantitative methodology using a stratified probability sample and survey questionnaire was employed to engage in this topic as objectively as possible. Explored themes relating to union fees, membership, benefits, teaching and learning, performance, and strike action revealed some notable incongruities with existing literature.

Firstly, despite some accounts suggesting otherwise, respondents in this study report a general satisfaction with their unions. Secondly, although the majority reject the principle of forced union-membership, most respondents indicate that they would, nevertheless, remain voluntarily unionised. Thirdly and perhaps more significantly, in contrast with the historical 'militant vs. professional' conceptions of teacher unions, this study found more similarities in the attitudes of apparently polar-opposed union members than differences. As more recent local and international literature has argued then, this report's findings support the argument that polarised union 'types' no longer appear to be as distinct as they once may have been.

Perhaps the finding of most import of this study though, is that despite the glut of media reports which suggest an-almost innate desire of SADTU teachers to strike, a massive 76% of sampled teachers in this study - including those reporting SADTU-affiliation - rejected *outright* the use of unprotected strikes to achieve union goals. This finding calls into question the use of illegal strikes as a negotiation tool of more 'militant' teacher unions in South Africa, and should encourage teacher unions to explore alternative negotiation tools for future union practice.

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Abbreviations

ANC	African National Congress
DBE	Department of Basic Education
DoE	Department of Education
ELRC	Education Labour Relations Council
GDE	Gauteng Department of Education
NAPTOSA	National Professional Teachers' Organisation of South Africa
NUE	National Union of Educators
SADTU	South African Democratic Teachers' Union
SAOU	*Suid Afrikaanse Onderwysersunie* (or SATU in English)
SATU	South African Teachers' Union (or SAOU in Afrikaans)
SD	Standard Deviation
US	United States of America

Chapter 1: Overview

1.1. Introduction

Over the last two decades, a glut of global and local literature has been published on the drawbacks of trade unions in general. In the education sector, teacher unions themselves are a no less popular defendant in these disparaging studies and reports. Evidence of intimidation, abuses of collective bargaining, violent protests, corruption, and myriad other injurious actions are frequently portrayed as ubiquitous bedfellows of teacher unions in this literature (see O'Grady, 2013; Bascia & Osmond, 2012; Letseka, Bantwini, & King-McKenzie, 2012; Msila, 2013.; Patillo, 2012; Mahlangu, 2011; Fleisch, 2010; Heystek & Lethoko, 2001).

Certain unions, both local and abroad, are openly and even proudly militant (O'Grady, 2013; Heystek & Lethoko, 2001). It could thus be argued that the media and academia are justified in their largely negative portrayal of teacher unions.

Newer, more complimentary literature on unions describing their 'real' value is also coming to the fore. This positive spin on unions is, however, more evident in international than in South African literature (Fourie, 2013; Eurofound, 2012; Bascia & Osmond, 2012; Varghese, 2010; Mestry, Hendriks & Bisschoff, 2009; Heystek & Lethoko, 2001).

In defence of teacher unions in the United States of America, for example, Bascia and Osmond (2012) maintain that the current 'demonization of teacher unions' by the media is fuelled by what Goldstein (2011, in Bascia & Osmond, 2012) attributes to a tendency of the press to observe and comment on union activities in a critical, as opposed to neutral manner. These authors (Bascia, and Osmond, 2013) argue that that strong collaboration between government and teacher unions is actually key to successful education systems, and that more needs to be done to encourage this engagement.

What is common to both local and international literature in the positive vein however, is the focus on the complex and dynamic roles of the teacher union: as protector of teacher-interests; as willing respondent and partner in policy creation; and as co-ordinator of professionalising activities (Bascia & Osmond, 2012; Mestry *et al.*, 2009; Farkas *et al.*, 2003; Heystek & Lethoko, 2001).

1.2. The problem

The result of these contrasting reports is that teacher unions are increasingly depicted as either 'villains or heroes' (Bascia & Osmond, 2012) in both media and research literature. There is also paucity, most notably in South Africa, in research examining the views of education-related issues *from the perspective of teachers themselves* (Naong, 2007). As such, it is difficult to determine whether the ever-increasing incidence of negative – and less prolific positive - press and research around teacher unions in South Africa reflects the local education environment accurately; whether a disproportionate dualistic portrayal of unions is correct; or whether this representation is because researchers and the media are simply focusing on extreme cases, or even on different unions.

In literature for example, the South African Democratic Teachers Union (SADTU), which reports itself as the majority teacher union with a membership of 240 000 (or approximately 70%) across South Africa (SADTU, 2013), is often depicted in a negative, obstructive light in much of the literature (see *inter alia* Letseka *et al.*, 2012; Patillo, 2012; Fleisch, 2010; Mestry, 2009; Zengele, 2009; Shermaine, 2008; Govender, 1996). The National Professional Teachers' Organisation of South Africa (NAPTOSA) however, which is South Africa's second largest, although substantially smaller union with approximately 56 000 members (NAPTOSA, 2013), is often depicted in a more positive, professionalising light (Heystek & Lethoko, 2001; Msila, 2013).

1.3. Problem statement

For the most part, academic and media reportage in South Africa on union-related topics reflects a predominantly negative literature on teacher unions (see Letseka *et al.*, 2012; Msila, 2013; Patillo, 2012; Mahlangu, 2011; Fleisch, 2010). The literature is, however, lacking in generalisability, since most South African studies in the area of teacher unionism have been conducted using a qualitative framework of smaller sample case studies, interviews, or document analysis (see Letseka *et al.*, 2012; Msila, 2013; Patillo, 2012; Mahlangu, 2011; Fleisch, 2010). It is thus uncertain whether deleterious unionism is, in fact, as rife in South Africa as is inferred by the existing qualitative literature (Ibid).

1.4. Purpose statement

The purpose of this study is thus to extend the quantitative literature on South African teacher unions (see Letseka *et al.*, 2012; Patillo, 2012; Mahlangu & Pitsoe, 2011; Msila, 2013; Fleisch, 2010; Zengele, 2009; Shermaine, 2008; Phurutse, 2005; Heystek & Lethoko, 2001; Govender, 1996 by quantifying the nuanced attitudes and perceptions of central Gauteng teachers' towards South African teacher unions.

1.5. Research questions for consideration

Based on areas focused on in the literature review, the following three specific research questions were developed for this quantitative study. These informed the development of the instrument and provided thematic guidance for the interpretation and analysis of the data sets:

- What attitudes and perceptions do teachers exhibit about South African teacher unionism in general?
- What particular aspects of teacher unionism do teachers of different unions support and/or reject?
- Do teacher perceptions and attitudes support or contradict the findings of current qualitative literature on South African teacher unions?

1.6. Definition of concepts

While it is expressly *not* the purpose of this research report to either apply or develop any existing theories to the topic of teacher unionism, the intention to describe a currently under-investigated area of the topic through investigating attitudes and perceptions does require an understanding of both concepts. This section provides a brief outline of the concepts of attitude and perception, as they are used throughout the findings of this report.

1.6.1. Attitude

What attitude is, what it comprises, and how it affects humans is the subject of considerable debate (Pickens, 2009; Piderit, 2000). For the purposes of this study, however, a 'tripartite' view of attitude as espoused by Pickens (2009) will be utilised.

Pickens summarises Allport's (1935, in Pickens, 2009) definition, indicating that it is a 'mindset or tendency to act in a particular way due to both an individual's experience and temperament' (Pickens, 2009:44).

According to this conceptualisation, attitude encompasses three elements:

- an affect (or feeling) about a particular topic;
- cognition (or a thought or belief) about a particular topic; and
- behaviour (or an act) related to a particular topic.

This study endeavours to describe the sampled population's feelings, thoughts, and behaviours relating to teacher unions active in central Gauteng. The data collection instrument is designed to investigate the three elements of attitude towards teacher unions and provide for appropriate measurement of attitude through Likert-scale questions, formulated with consideration of Morrel-Samuel's guidelines on attitude surveys (2002 in Pickens, 2009).

1.6.2. Perception

Lindsay and Norman (1977 in Pickens, 2009:52) explain perception as the process by which beings 'interpret and organise sensation to produce a meaningful experience of the world'. Perception is therefore closely related to attitude, in that it shapes attitude (Pickens, 2009).

Assael (1995, in Pickens, 2009:54) cautions, however, that 'receptiveness to … stimuli is highly selective and may be limited by a person's existing beliefs, attitude, motivation, and personality'. As such, perception not only frames attitude - attitude also influences perception (Pickens, 2009).

Perception may, and frequently does, therefore, differ from reality (Pickens, 2009). This is an important consideration for this study, as indications of even well-supported perceptions may not *necessarily* reflect the reality of teacher union practices. The perceptions of the sampled teacher population are compared with findings in existing qualitative literature on teacher unions, and also, where applicable, with the aims and objectives of the unions themselves. Any notable variances are recorded in the data analysis and findings phases of the study.

Chapter 2: Literature review

2.1. Introduction

Internationally and locally, extensive research and analyses into various teacher-union-related topics have been conducted. In a country such as South Africa, where teacher union activity forms a visible and tangible part of life for many, this is especially true. As such, there is no shortage of union-related research in media, government and academic environments.

The types and foci of teacher-union-related research vary somewhat however, and logically, genres are dictated by the particular contexts in which the studied unions operate. There is, for example, a much more political, militant, and economic focus on South African union literature and media coverage than union literature from the United Kingdom or United States, where it tends towards the role of unions in teacher development and professionalisation (see Bascia & Osmond, 2012; Letseka *et al.*, 2012; Fleisch, 2010; Farkas *et al.*, 2004; and Govender, 1996).

To outline the existing literature, a brief exposition of the available teacher-union-related academic literature with bearing on this study in the South African context is proffered. Subsequent to this, a brief outline of North American studies that have direct bearing and influence on the construction of the survey instrument will be included. Media articles, editorials and commentary are not included in any detail, but have informed the general research design and subsequent stages of the research.

2.2. Local union literature

One of the foundational influences on current South African education literature is the pre-democracy development of South African teacher unions. Various early studies (see Hyslop, 1990 in Fleisch, 2010; Kallaway, 2002; Moll, 1991) document the historical and often cyclic nature of teacher militancy and the South African political landscape.

Studies such as those conducted by Heystek and Lethoko (2001:223) contribute to the political literature by noting that towards the end of apartheid, the major aim of the establishment of teacher unions, and especially black teacher unions, was in fact to fight, militantly if necessary, for the political rights of teachers and to oppose the Bantu Education system.

A willingness to engage in combative action continues today, in both legal and illegal formats. As one participating principal in Pattillo's (2012) study of South African township schools indicates: '… in this country, there is only one instrument of talking: it's the strike' (Patillo, 2012:13). SADTU Gauteng's leadership heartily approves of this approach, with its Secretary General holding that: '…the day [our] militancy stops, so will [our] existence' (Heystek, 2001:227).

Other local literature suggests a deleterious effect of the unions on both teaching and learning, and on the teaching profession itself. Msila's (2013) exploration of teacher unionism from the perspective of school principals, using ten urban schools in the Eastern Cape as a sample population, establishes a meaningful qualitative correlation between strong political union affiliation among teachers and the 'paralysis of school management and leadership, with negative consequences for … effective teaching and learning' (Msila, 2013: 1).

SADTU's official goals (2013) perhaps contribute – if indirectly – to these negative consequences by prioritising union-member satisfaction. In this regard, the underlying assumption appears to reflect that quality education for learners is only possible once union members are satisfied with both working conditions and remuneration (Heystek & Lethoko, 2001).

Other studies (and a plethora of media analyses) highlight the topic of union violence, 'mischief' and striking in South Africa. Fleisch's (2010) exploration into the June 2009 Soweto SADTU illegal strikes, and Letseka, Bantwini and King-McKenzie's (2012) analysis of public-union sector politics and educational crisis in the country are just two examples of this well-covered genre (see also Mahlangu and Pitsoe, 2011). In the Fleisch study, for example, the author offers a comprehensive, cross-checked analysis of artefact and media coverage of the June 2009 events in Soweto and highlights the use of violent and intimidatory practices by members of SADTU in pursuit of their goals.

Letseka *et al.* (2012) too cite instances of intimidatory and militant behaviour by SADTU, suggesting that the union frequently carries out its protest action with 'total disregard for the impact on teaching and learning' (2012:1199). The authors (Ibid) specifically cite the violent and 'bitter battle' SADTU waged against Whole School Evaluation when the Department of Education (DoE) attempted to roll it out as policy, effectively constraining its implementation (Letseka *et al.*, 2012).

In terms of policy engagement and gridlocks of this nature, Govender (2008:59) argues that teacher unions have a '… close but ambiguous relationship with the state in the policy arena', saying that this is the result of unions' need to influence policy in the interests of its members, but also – although not always – to act in the interests of consensus building with the state and its objectives.

Given the complex relationship between SADTU and the African National Congress for example, Govender (2008) argues that teachers have become caught in the proverbial middle, and therefore locked in perpetual skirmishes with the state over policy creation and ownership.

Letseka *et al.* (2012) documents the 'we demand' mantra of South African unions, citing Bloch (2008) who avers that this 'demand' culture is deeply entrenched and 'the only language known to unions' (Letseka *et al.,* 2012: 1201).

Heystek and Lethoko (2001) agree, arguing that SADTU is able to use both its political alliance with the African National Congress, and its willingness to strike legally or illegally to encourage this 'demand' culture, thereby forcing a focus on transformation, the rights and demands of teachers, and on mediating and developing educational policy.

Another local study on teacher perceptions of union membership intimates at gender iniquity in SADTU (Shermaine, 2008). The author notes significant differences in treatment between male and female leaders in SADTU, with female members being underrepresented in SADTU leadership (Ibid). There is, however, due to the small sample size of the study, no indication of whether these reported experiences are representative of the broader union practices or not.

Zengele (2009:74) suggests that within SADTU leadership there may be some – contested and contentious - support for 'building a union of professionals'. Zengele (2009) cites Thobile Ntola, SADTU's recently-suspended president's commitment to taking strong action against unprofessional teachers as being in stark contrast to previous SADTU president Willie Madisha's opinion that teachers are workers – not professionals (Zengele, 2009). As such, tensions in objectives also appear to be present within SADTU itself, and not just between different unions.

Studies such as Nick Taylor's (2006) School Reform and Skills Development Audit, and Heystek and Lethoko's (2001) analysis of union contributions to teacher professionalism also reveal that certain local unions can, and do, however, serve valuable functions.

Furthermore, Heystek and Lethoko (2001) argue that unions are uniquely positioned to improve the motivation levels of teachers by engaging in professional development, and in raising the status of teaching as a profession (2001). Bascia and Osmond (2013) agree with this sentiment. Unions like the South African Teachers' Union (SATU), the National Union of Educators (NUE) and NAPTOSA for example, are depicted in the Heystek & Lethoko (2001), and Bascia and Osmond (2013) studies as organisations that have significantly contributed to the professional development of their members. Many of these, more apolitical, unions reject party-political machinations and many also, significantly, reject the strike action so readily undertaken by SADTU (Ibid).

In his study on teacher unions and their role in the implementation of the Employment of Educators' Act 76 of 1998, Zengele (2009) maintains that both SADTU and NAPTOSA also play an important role in policy formulation, although given the membership weighting, SADTU holds more influence in the policy-making processes than NAPTOSA. Govender's (2008) study on the mediation of teacher unions in policy making further contributes to the literature on the roles that educator unions play in policy.

In terms of sampled populations, both quantitative and qualitative studies that specifically contribute to union literature from the perspective of the teachers are rare. Khumalo's (2008) study in Kwa-Zulu Natal examines teacher perceptions and their experience of teacher leadership in that area, and Naong's (2007) study into the impact of the abolition of corporal punishment on teacher morale provides some glimpse into teacher attitudes, but participating teachers clearly expressed their perception that consultation on matters that directly affect them is absent (Naong, 2007:287). Since teacher unions play both a direct and indirect role in the lives of teachers, a study that approaches the topic of unions from the teachers' own perspectives is arguably a logical step towards contributing to the existing literature. For this reason, teachers will form the sample of the study. To narrow the focus for purposes of generalisability, the sample will be specifically drawn from the central Gauteng region.

It should be clear from this brief outline that the bulk of teacher union literature in South Africa depicts a negative image of teacher unions by highlighting, *inter alia*, strike action, militancy and policy-hamstringing. A second type of union in the country, is however, also evident in some literature, depicting teacher unions as catering to their members' professionalism. Studies on both sides of this portrayal are, however, primarily qualitative, and therefore seldom generalisable to the extent of teacher unionism in South Africa.

2.3. International union literature

Media reports and research from countries as widespread as Mexico, the United Kingdom, Brazil, and India, demonstrate significant areas of volatility in the education union sectors (see Adams, 2013; O'Grady, 2013; Guardian Service, 2013; Eurofound, 2012).

In Mexico for example, teacher unions are a notable and negative current feature of the news arena, and markedly include reports of entrenched corruption and violent protests by unions against recently approved education reform legislation (Grant, 2013; O'Grady, 2013). Similar militancy is also reported in Brazil, Uruguay and Venezuela (Bisgaier, 2013; Guardian Service, 2013).

Poole (2007) uses organisational justice theory to conceptualise militancy in teacher unions, arguing that teachers construct their notions of justice and injustice in much the same way that employees in an organisation do. In the process, teachers make judgements about a particular organisation's leadership actions and then react to this judgement accordingly. Importantly, the author (Ibid: 727) acknowledges the individual subjectivity of perceptions of organisational justice, but stresses that '… justice is also socially constructed …', meaning that any organised, long-standing group, in this case, the formal unions under examination in this study, will naturally evolve some shared sense of justice. The implications of Poole's (2007) conceptualisation are clear if one applies it to different 'types' of unions: in more militant teacher unions, a behavioural norm generated by this shared understanding of justice, such as the penchant towards engaging in strike action, may be shared by those within the union, but may not, for example, be viewed as 'just' or legitimate by those in more 'moderate', professional unions.

In the United Kingdom, Redman and Snape's (2006) study of over 1000 teachers compared the attitudes of teachers from a more 'militant' union, to those from more 'moderate' union. The authors' (Redman & Snape, 2006) findings suggest that attitudes towards professionalism and levels of job satisfaction between teachers from militant unions differ markedly from those teachers in more moderate, professional unions.

The study (Redman & Snape, 2006) found, for example, that militant union members are much more inclined to participate in union activities and that they exhibit high levels of union commitment. Union activity-participation by more moderate union-members however, was found to be diluted by higher levels of organisational and professional commitment. These findings (Ibid) lead the authors to conclude that in the case of teacher unions at least, there appears clear evidence of both militant and moderate unions, and of a concomitantly polarised teacher membership.

The international literature does, however, tend to draw a slightly more positive picture on teacher unions than does the majority of South African union literature. Although not without their own problematic issues, unions in the United States of America (US) tend to display, on the whole, this more positive trend. Bascia and Osmond (2012), in their examination on teacher unions and educational reform for example, examine a number of earlier studies by Bascia and others involving, *inter alia*, the role of unions in teachers' professional lives (1994, cited in Bascia & Osmond, 2012).

Drawing on the earlier teacher-focused study, the Bascia and Osmond (2012) study outlines the expectations of teachers in the United States with regards to their union membership. It covers a gamut of topics, from collective bargaining to professional development (Bascia & Osmond, 2012),

and found support for the positive role that teacher unions can play in the lives of teachers. The broad nature of the Bascia and Osmond (2012) study offers relevant coding themes for this study, and will therefore be used to inform its design and analysis.

Another large-scale, mixed-methods study that supports the image of teacher unions as professionalising agents is the Broad Foundation's study in the US (Farkas *et al.,* 2004). Through a successfully executed questionnaire survey of over 1000 teachers, and subsequent focus groups, the study found that for US teachers, the union is their 'ally' and an organisation they can count on to protect them against unfair charges, the bureaucracy 'machine', favouritism, 'simple-minded educational "solutions"', and cost-cutting by government (Farkas *et al.*, 2004). In addition to the local Mestry *et al.* (2009) study, and the US-based Bascia and Osmond (2012) study, the Broad Foundation study's framework and questionnaire will also be employed to inform the design of the questionnaire for this study.

Finally, although not specifically related to teacher unionism, Varghese's (2010) investigation into trade unionism in general in Kerala, India, also offers some relevant survey questions. The questionnaire data analysis techniques of the Varghese (2010) paper will also therefore be incorporated where appropriate into the data collection tool, and into the later analysis of the data.

2.4. Conclusions regarding literature

In consideration of the abovementioned literature and existing media coverage on teacher unions, three marked conclusions may be drawn from this analysis:

1. There are mixed perceptions of teacher unions in South African media and academia.
2. Teacher unions are not uniform – there are vastly different depictions of different teacher unions in South African literature.
3. There is little known about what South African teachers *themselves* think about teacher unions.

Chapter 3: Research Methodology

3.1. Introduction

One of the most critical elements of research is the use of an appropriate research method (du Plooy-Cilliers *et al*, 2014). This is because, as Kumar argues, '[t]he strength of *what* you find largely rests on *how* you found it' (Kumar, 2014:39). Careful consideration of the appropriate methods and design is thus essential to improve the chances of the study arriving at valid findings and comparisons (Kumar, 2014), and any failure to engage adequately with this task may result in use of an unsuitable or faulty design (Ibid). Not only does poor or faulty design impact on validity and reliability of research, but it also represents a waste of human and other resources (Kumar, 2014).

Where this is concerned, while reliability relates to consistency in quantitative research (Koonin, in du Plooy-Cilliers *et al*, 2014) and requires that retests by different researchers would result in similar findings, validity relates to whether or not '… the research measured what is was supposed to measure' (Ibid:256). This latter concept also looks at two different forms, namely internal and external validity. For research to be considered internally valid, for example, the research method and design must satisfactorily answer the research question (Koonin, in du Plooy-Cilliers *et al*, 2014). To be considered externally valid, the findings of a study should be generalisable from the selected respondent sample to a larger population, so if the study was conducted on a larger sample of the given population, the results would still reflect similar findings (Ibid).

Bush (2009:49) argues, however, that regardless of how precise a researcher's design is, research is '… never error-free, as it always contains a certain amount of change/random error'. Koonin (in du Plooy-Cilliers, 2014:257) agrees, saying that studies will always contain a small margin of error, regardless of rigour. Depending on the extent of these errors, various impacts will be felt on the ultimate generalisability, validity and reliability of a study (Kumar, 2014) and it is therefore essential to try to control for these as far as possible, or to acknowledge limitations where it is not possible (du Plooy-Cilliers *et al*, 2014).

Du Plooy-Cilliers *et al* (2014: 276) describe these limitations to research as the '…constraints or limits in [a] research study that are out of [one's] control', mostly notably around budget, time, accessibility, and changes in conditions. These limitations are pervasive in educational, and other, social research since these studies measure complex human characteristics which cannot be controlled for in the same way that true experimental designs can (McMillan & Schumacher, 2010).

This chapter describes the design and methods used to structure and execute this study, which seeks to answer the following research questions, previously introduced in Chapter 1:

- What attitudes and perceptions do teachers exhibit about South African teacher unionism in general?
- What particular aspects of teacher unionism do teachers of different unions support and/or reject?
- Do teacher perceptions and attitudes support or contradict the findings of current qualitative literature on South African teacher unions?

In addition to the specific research design, sampling and data collection methods used, the ethical considerations, strengths, and limitations of each element of the research method are outlined in this Chapter.

3.2. Research design

This study adopts a Positivist paradigm and uses quantitative methods to examine the research questions in as objective a manner as possible (Mouton, 2009). Although a qualitative approach using in-depth interviews, focus groups or case studies would have yielded more detailed insights into a smaller number of individual teachers' attitudes and opinions, the adoption of a quantitative approach was deemed more appropriate for the purpose of scale and generalisability (du Plooy-Cilliers *et al*, 2014). Furthermore, the current qualitative literature covering teacher unions, as well as the dearth of quantitative literature on the topic, supports the need for further quantitative exploration of teacher unions (see Patillo, 2012; Zengele, 2009).

A cross-sectional survey questionnaire design was thus selected to assist to establish observations that are as 'precise and accurate' (Babbie, 1992:91) as possible, and to allow for a level of generalisability of findings (du Plooy-Cilliers *et al*, 2014). Given the lack of quantitative literature on teachers' attitudes to and perceptions of teacher unionism, and the descriptive purpose of this study, no research hypotheses were generated for this study.

Details of the population, sampling, instrument, data collection, ethical considerations and data analysis are outlined in the subsections below.

3.3. Population of the study

After considering the purpose of this study and the logistical constraints in terms of both time and resources (du Plooy-Cilliers *et al*, 2014), the population for the study was restricted to public-school teachers in central Gauteng. Individual factors within different provincial education and union structures prevail, including, as is discussed later, the relative proportions of union membership.

As such, it is not the intention of this study to infer findings from this sample to other provinces - any generalisations possible from this study should be extended only to the central Gauteng region. While similar attitudes and perceptions may well exist across the teacher population in the country, further studies of this nature would be necessary to determine whether findings are similar or not.

To aid reporting and comparisons between different respondents, units of analysis by union-affiliation are used throughout this study (McMillan & Schumacher, 2010). However, in order to avoid potential distortion of the weighting of responses and cluttering of this report, a minimum of five completed responses for each union was deemed necessary in order to qualify as a separate unit of analysis. As such, of the seven possible unions (ELRC, 2012) three unions are represented as units of analysis in this study: SADTU, NAPTOSA, and the Suid Afrikaanse Onderwysersunie (SAOU/SATU). In addition to these three unions, a fourth unit of analysis, namely unaffiliated respondents, was also used where relevant.

To inform a representative sample size for this study, The Gauteng Department of Education's *Annual Performance Plan 2012/2013* (GDE, 2013) was used to establish the total population of educators in Gauteng. The report (GDE, 2013) indicates a total of 52 013 publically employed educators in ordinary schools for the 2012/2013 year. This number includes all primary and secondary ordinary school educators in all quintiles within the greater Gauteng province. The sampling methods used thus attempted to obtain as representative a sample of this particular population as possible.

3.4. Sampling procedure

This study uses a hybrid-sampling method comprising an initial probability sample, and a subsequent non-probability method. This sampling method was deemed suitable for obtaining a union-proportionate sample (Struwig & Stead, 2009) of educators in central Gauteng while taking into consideration the logistical constraints of the study. Stage one of sampling employed a stratified random probability sample, and stage two made use of a non-probability volunteer sample within the initially-sampled groups (du Plooy-Cilliers *et al*, 2014).

To establish a suitable sample size, data fields for this research project were input into the Raosoft's Sample Size Calculator (2004) with the parameters set as follows:

- Margin of error of 5%,
- Confidence level of 90%
- Population size of 52 013 (GDE, 2013)
- Response distribution of 50%

Raosoft (2004) recommended, given these inputs, a minimum recommended sample size of 270 returned surveys in order to provide for acceptable validity, reliability and generalisability of the data.

Given the focus of this study, in order to obtain a sample that was adequately representative of the unionised teacher population of central Gauteng, it was necessary to reflect the proportionate membership of the major unions during the first stage of sampling in order to increase the potential external validity of the study's findings (du Plooy-Cilliers *et al*, 2014).

Heystek and Lethoko (2001; see also Msila, 2013; Fleisch, personal communication, 2013) indicate that SADTU's national membership base is predominantly located in the lower quintile schools, while NAPTOSA and other union's membership are predominantly representative of the uppermost quintile schools. As such, in order to attempt to match the broader membership weightings of 70% and 30% respectively for SADTU and other unions (SADTU, 2013; NAPTOSA, 2013), two different strata were targeted:

- Seventy-percent of the sample comprised Quintile 1 – 4 schools at the first stratum to increase the incidence of SADTU educators; and
- Thirty-percent of the sample comprised Quintile 5 schools at the second stratum to locate members of NAPTOSA and other teacher unions.

In order to select schools suitable to these characteristics, stratified random probability sampling was used. Struwig and Stead (2009:112) describe probability sampling as a method in which 'every element in the population has a known non-zero probability of selection'. Stratification of the population in this case allowed for more accurate representation of the necessary groups, and also for specific characteristic data to be collected for each stratum (Struwig & Stead, 2009). In this study, the union-affiliation of the respondents was the main differentiation.

Struwig and Stead (2009) caution, however, that accurate information on the proportions of each stratum is necessary for accurate sample to be drawn. Given the indicated union-affiliations of the

sample drawn in this study, which are not in accordance with SADTU's claimed figures (SADTU, 2014), Struwig and Stead's (2009) caution is indeed relevant to this study, although the sample demographic did reveal an interesting fact about SADTU's claimed membership figures. The issue of union sample-size is, however, dealt with in more detail in Chapter 5 under the topic of union membership.

The Excel™ format Gauteng Province Master List (DBE, 2013) was used as the sample master list for this study. It was digitally sorted into schools within the Quintiles 1 – 4 range, and schools in Quintile 5. This list proved useful for sampling purposes as it includes details of quintile levels, teacher numbers, and the exact locations and contact details of each school and principal.

Population parameters were built in to narrow the possible population and excluded private schools; schools that did not reflect quintile numbers; and those that are located more than 100km outside of Johannesburg.

After initial sorting of the master list (DBE, 2013) into two different documents, one for Quintile 1 to 4 schools, and one for Quintile 5 schools, an online sample research randomiser (Social Psychology Network, 2008) was used to generate random numbers. These numbers were applied to the documents to assist in maintaining acceptable confidence levels for the study (Struwig & Stead, 2009) in the identification of the following types of schools:

- Quintile 1 – 4 primary and secondary schools within a 50km radius of Johannesburg (from which 70% of the sample was drawn)
- Quintile 5 primary and secondary schools within a 50km radius of Johannesburg (from which 30% of the sample was drawn).

Schools inside the necessary criteria were thus identified using this method, and approached to participate in the study. Schools who declined participation were removed from consideration and replaced with other schools on the lists using the same random number generator, allowing the researcher to source alternatives where necessary and still meet the required survey return goal of 270 surveys.

For phase two of the sampling method, volunteer sampling was selected for two main reasons: firstly, the initial sample phase had already accomplished the funnelling of an appropriate sample group from which to garner relevant information (du Plooy-Cilliers *et al*, 2014), and secondly, participation was, by necessity, required to be self-selecting.

With regards to volunteer sampling however, a major concern highlighted by du Plooy-Cilliers *et al* (2014) is that it can be an unreliable, error-prone sampling method. This is, among other things, due to volunteers either expecting some gain from their participation, or because they wish to express their dissatisfaction with something in particular (Ibid). Kumar (2014) agrees and cautions that the views of those who return survey questionnaires may not necessarily reflect the views of those who do not.

A further problem with volunteer sampling is the danger of respondents providing 'what they believe is the desired answer instead of what they truly think' (du Plooy-Cilliers *et al.*, 2014:144) which was a particular danger in this study, considering its potentially emotive subject.

It must be also be noted that non-probability sampling carries with it the requirement of personal judgement on the part of the researcher (Struwig & Stead, 2009:111), which increases the risk of a sample becoming statistically inaccurate (Ibid). This shortcoming played an important role in the decision to employ the initial probability sampling method, which limited the possible variances of the sample to a reasonably homogenous population, namely, teachers in public schools in Gauteng.

In terms of implementation, the initially envisioned phase two of sampling entailed the researcher outlining the study in person at the sampled schools, and then inviting teaching staff to volunteer to complete the survey. Although most demonstrated a willingness to participate in the study, permission to access school staff rooms was declined by the first four principals who were approached in the early stages of data collection. As a result, the second phase of sampling, along with the instrument administration plan, were adapted to meet the conditions indicated by the principals.

In the adapted method, after providing the necessary documentation and briefing the principals or, where relevant their representatives, the surveys were delivered to the schools by either the researcher or a - carefully selected - research assistant. The research assistant was fully briefed on the nature and specific requirements of the study prior to data collection, and possessed a suitable academic background necessary to fully appreciate the importance of adhering to the prescribed data collection method.

After delivery of the survey instruments, school principals or their representatives then conducted phase two of the sampling by informing their staff of the study's purpose and nature, and sourcing volunteers to complete the survey. This compromise, while allowing the researcher to obtain input from teachers, admittedly introduces certain limitations to the study.

The possibility of bias or interference from outside parties is also a potentially limiting factor in the study's volunteer sampling stage. Perhaps of more potential concern however, is that any bias or interference will likely remain undetected because the researcher could not be present at stage two of sampling and so possessed no direct oversight.

Equally, the danger of volunteers providing 'desirable answers' (du Plooy-Cilliers *et al*, 2014) was potentially heightened, given the reliance on principals as the administrators of the survey. Because respondents may not have had full trust in the anonymity and confidentiality of their responses, they may have been more likely to provide responses that they felt were desired.

Having the school principal request participation may also have had an artificial effect on participation, and therefore may have influenced the voluntary participation requirement of the study. Some teachers may have felt obliged to complete the survey and thus volunteered where they would usually not have; others may have assented to complete the survey but deliberately failed to engage with it; and others may not have trusted the promise of anonymity and provided answers that they thought were desired, as opposed to what they really perceived at the time of the survey (du Plooy-Cilliers *et al*, 2014). None of the responses collected however, indicated any concern about the administration of the surveys by the principals. The absence of evidence that this did occur however, is not proof that interference or bias did not occur.

Where possible, specific measures were taken to mitigate the various shortfalls of using non-probability sampling method. Using a hybrid sample method that first filtered the population into a more homogenous target group via a probability sample, not providing rewards for participation, and constructing the survey questionnaire in as objective a manner as possible, were all attempts to minimise these potential issues. The potential shortfalls must, however, be borne in mind when reading and evaluating the findings, and a neater solution for sampling should possibly be sought for any future similar studies.

3.5. Instrument

The decision to employ a cross-sectional survey instrument for this study was primarily based on the suitability of questionnaires for gathering large amounts of data on attitudes and perceptions of a sample group at a single point in time (du Plooy-Cilliers *et al*, 2014; Trochim, 2001 in Bush, 2009).

Surveys are one of the most widely used techniques for gathering social science data (McBurney, 1994) and use of this format may contribute to the credibility of a study through its myriad advantages (Ibid). Specifically, the survey questionnaire's flexibility in terms of possible question-

types and administration; its ease and speed of use for respondents; its offer of anonymity and concomitant improvement in honesty; its potential use for establishing trends and correlations across responses (McBurney, 1994); and its relative low-cost of development and administration all provide a convincing cumulative rationale for its deployment here (du Plooy-Cilliers *et al*, 2014; Kumar, 2014).

In addition to these benefits, Trochim (2001, in Bush, 2009) argues that cross-sectional designs also have advantages over longitudinal research designs, not least of which is the minimised effort required from research respondents, since less time and effort are required to complete once-off surveys than longer, repeated studies (Ibid).

Perhaps the most significant advantage however, is the survey instrument's ability to generate standardised data sets which are simple to codify, collate and interpret, and which are more generalisable (du Plooy-Cilliers *et al*, 2014) than the current qualitative research that exists on teacher unions in South Africa.

It should, however, be acknowledged that use of survey questionnaires is not without its inherent dangers. One of the significant drawbacks of utilising a quantitative survey for data collection, for example, is that access to details of the reasoning behind respondents' answers is limited (McMillan & Schumacher, 2010), and, as a result, the information gathered may lack depth (Kumar, 2014).

Given the volume of qualitative, and therefore detailed but not generalisable literature already available on the general topics around teacher unionism (see Fleisch *et al.*, 2010; Govender, 1996; Heystek *et al.*, 2001; Letseka *et al.*, 2012; Mahlangu and Pitsoe., 2011; Moll, 1991; Msila, 2013; Patillo, 2012; Shermain, 2008; and Zengele, 2009), and the dearth of quantitative literature in this particular area of study, it can be argued that there is a need for a quantitative study in this space. This particular limitation should not, therefore, represent an area of notable concern for the study. Reasons for particular findings should, however, possibly be sought in subsequent related studies.

The use of English may have also pose challenges to respondents who speak English as a second or subsequent language. To avert misunderstandings or alienating respondents, a simple, respectful tone and language was used, and further revisions were made to simplify language after the two pilot studies. Questions were provided as statements in a straightforward manner that required only the indication of an 'x' in the appropriate spot, and instructions were repeated for each section to aid clarity.

According to Kumar (2014) another shortcoming of surveys is that low response rates are characteristic of this method of data collection and the author accordingly advises that researchers

consider themselves fortunate with a response rate of just 50%. As such, a major concern of this study during the planning phase was the risk of failing to obtain the suggested 270 (Raosoft, 2004) questionnaires and the subsequent implications this could have on the study's validity and generalisability (McMillan & Schumacher, 2010).

In order to increase the chances of volunteers completing the survey, a tailored design approach (Dillman *et al*, 2008) was used in the development of the instrument. Efforts to improve the rewards and reduce the potential costs of answering the questionnaire (Bush, 2009) included ensuring that the question topics were relevant and of interest to the teachers, that the design was appealing and simple to use, and that the survey provided an opportunity to be 'heard' in an area notoriously lacking in 'teacher voice' (Naong, 2007). The importance of the area of study, as well as these abovementioned elements were highlighted in the formal documentation and discussions with the principals in order to improve the rate of participation at the school level.

Using a tailored design approach is not, however, sufficient to proclaim a survey instrument complete or necessarily suitable for purpose. Du Plooy-Cilliers *et al* (2014) advise, for example, that researchers employing the survey method should be highly familiar with the common pitfalls and errors in survey-question development and interpretation, and note that surveys often run the risk of extracting only superficial, and thus unimportant information.

To avoid effecting these errors, the researcher adopted a number of safeguards. The first of these included the use of existing studies' survey questionnaires (see Mestry *et al.*,2009; Varghese,2010; Farkas *et al.*, 2003) as frameworks for adaptation. In addition to this, the researcher examined typical problems associated with questionnaires (du Plooy-Cilliers *et al*, 2014), and also conducted two rounds of pilot studies using test sample respondents.

During the development stage of the questionnaire, questions were checked for double-barrels, ambiguity and bias, and were also designed to include a small number of verification keys to monitor for social desirability responses (McBurney, 1994). Efforts were also made to ensure exhaustivity and mutual exclusivity of the options used for closed-questions (Ibid).

In addition to these steps, a collection method that was used successfully in another South African study (see Mestry *et al*, 2009), and the experiences of another researcher using a similar method (see Bush, 2009) were considered, as was adapting distribution and collection as requested by the principals. By working to make the survey easy to read, understand, respond to and return, the researcher attempted to increase the chances of all sampled teachers, and not just those who felt

dissatisfied or wished to 'voice their unhappiness' (du Plooy-Cilliers *et al*, 2014), responding to the survey.

A different concern that Kumar (2014) raises regarding the use of self-administered questionnaires is the lack of opportunity for spontaneous, and thus more honest, responses by respondents. He asserts that the danger of respondents reading through the questionnaire prior to responding to any questions exists, and that this may have an effect on the responses to all questions (Ibid). This was not deemed to be problematic in the case of this survey, however, since questions were presented in a reasonably random manner, and did not necessarily 'build' or sequence on each other. Reading through the entire survey prior to responding should not, therefore, have had any effect on responses.

A related limitation that Babbie (1992) points out, is that in attempting to obtain a quantitative data set, an exclusive use of closed-ended questions may result in some possible responses being overlooked and respondents becoming frustrated or confused. If a mixture of open and closed questions are used to remedy this, respondents may answer the closed questions, but not complete any open questions (Babbie, 1992). This study primarily sought to obtain data that could be processed quantitatively. As such, the need for open questions was minimised and the dangers of non-response did not impact on the study. To avoid frustrations from exclusive use of closed questions however, a single, optional open question was offered at the end of the survey. Responses to the one open question were not, however, analysed as part of the findings.

It should be noted that those more comfortable with English are more likely to enter a response to open questions, thus potentially skewing data for the final question in this study by demographic (Babbie, 1992). Given the lack of intent to generalise that item's responses, and the nature and poor grammatical quality of the majority of responses to the final open question, however, this limitation should not be of great concern for the study.

To heed du Plooy-Cilliers *et al.*'s (2014) caution against potential superficiality of the questionnaire, the researcher used the three research questions and identified specific themes from both local (see Patillo, 2012; Msila, 2013.; Mestry *et al.*, 2009; Shermain, 2008; Heystek & Lethoko, 2001) and international literature (see Bascia & Osmond, 2012; Varghese, 2010; Morrel-Samuel, 2002 in Pickens, 2009, Farkas *et al.*, 2003) to inform the questionnaire content.

Specifically, the survey sought to establish the targeted sample's attitudes and perceptions relating to unions on a range of issues including union fees, membership benefits, promotions, teaching and learning, legal representation, membership, policy development, and strike involvement.

Table 1 below provides an outline of the structure and cohesion of the questions in relation to the research questions and themes:

Table 1: Alignment of Survey Items to Research Questions and Themes

Research Question	Themes Investigated	Item Number (see Annexure B for detail)
1. What attitudes and perceptions do teachers exhibit about South African teacher unionism in general?	Union fees	B07; B08
	Union benefits	B09; B20; B21; B22; C25; C26; C28
	Union membership	C29
	Strike action	B13; B14; C27
	Teaching and learning	B15; B16; B17; B18
2. What particular aspects of teacher unionism do teachers of different unions support and/or reject?	Union benefits	B09; B20; B21; B22
	Performance evaluation	B19
	Strike action	B13; B14
3. Do teacher perceptions and attitudes support or contradict the findings of current qualitative literature on South African teacher unions?	Union membership	A01; A02; A03; A04; A05; A06; B10; B11; B12; B23; B24; C29
	Union benefits	B09; B21; C25; C26; C28
	Strike action	B13; B14; C27
	Teaching and Learning	B16; B17; B18; B19

After the first round in the pilot study, a number of suggestions for improvements were considered and implemented. To improve internal reliability and validity (Struwig & Stead, 2009), pilot respondents were also asked to indicate the numbers of any questions that they had difficulty understanding in terms of instructions or wording. Extensive revision to the language-use was also made since a number of pilot-study respondents felt that the English used was pitched at too high a level, potentially alienating some of the targeted sample. A few further issues, primarily with the question template itself, were also emended after the second phase of piloting.

The questionnaire (see Addendum A) was ultimately structured as a range of numbered, closed-ended questions, matrix statements, and a single, final optional open question (du Plooy-Cilliers *et al*, 2014).

Section A employed six closed-ended questions and sought to ascertain demographic data including gender, age, official position held, highest qualification, experience, and union affiliation. Section B presented 18 matrix, Likert-scale statement questions relating to the attitudes and perceptions of teachers towards their unions. Section C dealt with teacher unions in general and made use of five matrix, Likert-scale questions.

All matrix questions were framed using a consistent five-point scale (du Plooy-Cilliers, *et al*, 2014), with rankings from 1 (Strongly agree), to 5 (Strongly disagree) but did not attempt to create total individual scores for respondents. Ranking 3 was provided as a 'don't know' option.

Carifo and Perla (2007:113) argue that Likert himself indicated that statements should be positively expressed, and that they should range from 'mildly positive to strongly positive, and then the same relative to a range of negative statements'. In accordance with this advice, of the 23 Likert scale questions, 21 were framed as positive expressions. Two statement items (Item 22 and 29) were, however, framed negatively for reasons discussed later, but maintained the same response range scale. Although these statements were thought out and piloted, the potential confusion and positive-response habit based on the 23 other positively-framed questions mean that rephrasing them would possibly be a wise move for any future use of the instrument.

An optional, final space for comments (OQ30) was also provided in the survey and invited survey respondents to comment on any area of teacher unionism if they felt so inclined. Although this space was not designed to obtain any specific responses, a not-insignificant number of respondents (49 of the 288, or 17%) made use of this space to comment on various union-related issues, or occasionally, to comment positively on the study or questionnaire itself. It should be noted that while these comments (OQ30) have been coded (see Addendum B for coded summary) to maintain consistency within the data set, due to their qualitative and unstructured nature they are used exclusively in Chapter 5 and have not been analysed in the same manner as the closed and matrix-style questions of this survey.

A total of 380 survey questionnaires were printed on single A4 sheets, using a clear *sans serif* font, double-spacing, and clear boundaries between the questions, with printing restricted to one page per sheet. The survey instrument covered a total of six pages. An extra, removable cover page served as an informed consent document.

While this was admittedly a paper-intensive and potentially wasteful format, the decision to use it was taken to ease use, ensure clarity, and to prevent respondents from 'missing' any pages and questions on the flip-side of the survey sheets. The final surveys therefore consisted of seven stapled pages, and were inserted into self-sealing envelopes, ready for delivery to the sampled participating schools.

In order to increase the likelihood of obtaining the recommended 270 returned surveys, 360 surveys were distributed to 16 sampled schools.

In retrospect, based on the returned surveys, questions appear to have been understood, and answers are consistent across internal verification keys. The instructions for Section B appear to have caused some confusion though, and in a few cases resulted in poor, or clearly erroneous responses. Although this has not had any significant impact on the data since the incidence of this is in less than 5 returned-and-used surveys, and in six of the discarded surveys, any future use of the questionnaire will necessitate a review of the instruction for Section B of the questionnaire.

3.6. Data collection

To gain access to research respondents subsequent to the probability phase of sampling, various gatekeepers (Punch, 2014) were approached for permission prior to the survey questionnaire being administered to the research respondents. These gatekeepers included the researcher's Supervisor, the University of the Witwatersrand's Ethics Committee, the Gauteng Department of Education (GDE), and the individual principals at each sampled school. At each point, specific conditions were met and, where necessary, the research design was adapted.

During the first phase of access, the researcher contacted the principals or their representatives telephonically or via email where they were not initially available. These conversations were, where permitted, followed up with details of the study, as well as the relevant permission documents and a sample of the survey questionnaire where requested (see Addenda A, C and D).

Eight of the principals approached declined to participate in the research for a variety of reasons, most notably because of administration overload and 'research fatigue' – three out of the eight principals indicated that their teachers were overburdened with departmental administration and would not be interested in completing a research survey. Another (vice) principal indicated that her school was expected to participate in too many research projects and that it was simply not interested in participating in any further research. One principal declined participation without providing clear reasons, and three principals simply failed to respond to participation requests.

To compensate for these schools, the Sample Randomiser was used to select alternatives to make up the necessary survey target numbers.

Data collection was conducted over a two-month period, from August to September 2014. As indicated in the previous section, the initial strategy was to have the researcher personally present the study and make requests for volunteers to the sampled schools' teachers. This was declined by all principals who were initially approached, and a less 'invasive' but still agreeable, if less scientifically rigorous (see Section 3.8) solution was thus proposed and accepted by the principals.

The new format of delivery required the researcher to brief the principal/principal's representative either telephonically or via email. Principals/Principals' representatives were provided with a brief description of the purpose of the study, which was to gather information on what teachers think of teacher unions, in the absence of current literature on the topic. In addition to this, the importance of anonymity and the voluntary nature of the completed surveys was highlighted during these conversations/mails.

The researcher arranged survey drop-off times and dates that were indicated as convenient for the individual schools. Delivery was then made by either the researcher or a research assistant hired for this purpose.

To mitigate any risks to the integrity of the data and to confidentiality that were created through use of a research assistant, his deployment was limited to delivery of the survey instruments and collection of sealed envelopes.

The importance of anonymity and the study itself were carefully explained to the assistant, and all relevant ethical clearances were provided to him should school principals/principals' representatives' request these in hardcopy versions. The research assistant was also provided with a detailed list of the sampled schools' addresses, proposed or scheduled times and dates of delivery, contact details, and GPS co-ordinates.

It was important that the surveys were left in the care of someone who understood the sensitivity of the documents and the manner in which they were to be distributed. After a thorough briefing, the researcher deemed that the research assistant was sufficiently competent in this regard and thus proceeded to use him to deliver and collect the completed surveys.

During the briefing of individual principals/principals' representatives, each was asked to explain briefly the importance of the study to their staff, and also to highlight the confidentiality, anonymity and voluntary nature of participation in the study. After volunteers had been solicited,

they were asked to distribute the envelopes with the blank surveys inside them and request that teachers seal their envelopes and return them to the appropriate location within a given time-frame.

Most schools sampled adhered to the originally-negotiated delivery and collection times and dates, most of which were executed over a period of between two or three days per school in order to maximise the response rate. One school's surveys were, however, only collected five days after delivery because the principal had not had time to send the survey out in the first two days. His personal assistant contacted the researcher with a request to delay collection. Rather than resample a different school, this was agreed to, and a total of 14 completed surveys were collected from the school concerned.

A total of 301 surveys (or 84%) were returned to the researcher, with 13 (4%) of these being substantially incomplete or blank, and thus unusable. A total of 288 usable surveys were therefore collected, which indicated an 80% return rate.

The recommended sample number of 270 surveys was thus exceeded by 18 surveys. Recalibration of the Raosoft Sample Calculator (2004) with the new response size indicates an effect of improving the Confidence Level to 91% from its initially projected 90%. No other values were affected by the 18 extra surveys, so the final sample reliability figures for this study based on the obtained sample were, according to the Raosoft Sample Size Calculator (2004) as follows:

- Margin of error of 5%,
- Confidence level of 91%
- Population size of 52 013 (GDE, 2013)
- Response distribution of 50%

Two main reasons for the high return-rate are proposed. Firstly, the use of principals/principal's representatives to request volunteers may have increased participation since a relationship of authority and hierarchy exists that some teachers may have interpreted as 'required' instead of 'invited'.

It is, for example, unlikely that the same rate of return at individual schools, as high as 29 completed responses at one school, would have been achieved had the researcher, without the same official relationship, made the same request to teachers.

A second contributing factor to the high return rate is that schools who declined to participate did not receive surveys, and so were not included in the return-rate calculation. Eight school principals who were approached either declined participation, or simply failed to respond to requests to participate. Where this occurred, alternative schools were sought - using the sample randomiser and the DBE Master List (2013) as discussed earlier - to allow the researcher to meet the required 270 survey target. As such, surveys were only delivered to schools whose principals saw some value in the study, and this potentially improved the rate of return.

A final factor that may have contributed to the higher return rate was the use of collective administration, which, according to Kumar (2014), is one of the most effective ways of increasing survey participation. Engaging a 'captive audience' (Kumar, 2014:179) improves response rates and is essentially what school principals/principal's representatives will have used in their staff room meetings to explain and distribute the survey questionnaires.

3.7. Ethical considerations

Permission to conduct this study was sought from the University of the Witwatersrand's Ethics Committee and from the Gauteng Department of Education. Request for clearance from the University's Ethics Committee was submitted in time for the first sitting of 2014, and was granted on the 15th May 2014. A Research Approval request was subsequently submitted to the Gauteng Department of Education, and clearance was granted by the GDE on the 10th of June 2014.

Although no school learners, and so no minors, were used as respondents in this research study, certain elements of the study warranted caution in terms of ethics. Specific areas that were included for consideration by the University's Ethics Committee included:

- Voluntary participation;
- No harm to respondents;
- Privacy of information;
- Anonymity and confidentiality;
- Analysis and reporting.

The initial research proposal for this study offered an incentive for participation in the form of a raffle of three x R200 CNA vouchers. This was, however, deemed inappropriate by the University's Ethics Committee and was therefore removed from all documentation relating to the study. Kumar (2014) is, however, of the opinion that most respondents participate in studies because of its perceived importance, and not because of any incentives and so no serious detriment to the rate of response was envisaged from this ruling.

As such, effort was made to increase the perceived value of the study to teachers by ensuring that the study was framed correctly and that it covered topics relevant to teaching practice. The importance of the study was also carefully explained to the principals or their representatives to obtain their buy-in of the research project.

The Ethics Committee also requested additional data storage duration and location, as well as the completion of the GDE Research Application form. These requirements were duly implemented.

Of potential concern to the researcher was the contentiousness of the topic of South African teacher unions, and the possible intimidation of volunteers. The design of the study attempted to reduce any risks in this regard through use of anonymous and confidential surveys, and despite the possible threat, no untoward or intimidatory practices were observed or reported by the researcher, the research assistant, or the principals during the collection of the data.

A final potential ethical consideration relates to ensuring confidentiality and anonymity of the respondents. Kumar (2014) emphasises the importance of this protection, and, given the use of a research assistant and principals or representatives, this was an area of concern for the study.

In order to reduce the risk of unethical behaviour by the research assistant, he was thoroughly acquainted with the purpose of the study, and provided with a strict regimen for data collection. The use of self-sealing envelopes and unique codes as opposed to respondent and/or school names further sought to avoid any confidentiality breaches and unethical research. These efforts were similarly applied, although with different emphasis, to the principals or their representatives at the schools.

As indicated in Section 3.6, all returned envelopes were double-checked for tampering and no evidence of this was found. Acknowledgement must, however, be made that despite these efforts to ensure confidentiality, it is possible that this was not met in certain cases, most potentially at the school level where respondents would have delivered envelopes to the office in person. Respondents may also, of course, have voluntarily shared their responses with others despite the instructions, and so also breached their own confidentiality.

This latter breach is not, to the view of the researcher, an ethical issue, but rather relates to potential effects on the reliability of responses themselves.

Ultimately, the hidden nature of these phases of data collection do not allow for any assured determination of the security of respondents' confidentiality and so ethical concerns remain. As such, future studies should ideally attempt to negate the presence of go-betweens and employ a direct researcher–respondent data collection method.

3.8. Data analysis

Kumar (2014) outlines specific steps that should be followed during the data processing stage of a descriptive study, the first of which is 'cleaning' or editing of the returned questionnaires.

During the planning stages of this study, Raosoft's (2004) sample size calculator recommended a sample size of 270, with the margin of error set to 5%, confidence level to 90%, population size to 57 463 (DBE, 2010), and response distribution to 50%. A total of 321 sealed envelopes were collected from schools, all of which entered into the editing phase of data processing.

After ensuring that all surveys had been properly prepared for editing by removing them from their envelopes, checking their unique codes, and arranging them according to quintile set and school code, an edit of the raw data on all returned surveys was performed to ensure that they were free from inconsistencies and incompleteness (Ibid).

The researcher checked all responses given to all questions one respondent at a time for this phase of data processing (Kumar, 2014). As reported in Section 3.4, a total of 13 surveys returned in sealed envelopes proved either considerably incomplete, or entirely incomplete and so were discounted from the total tally of survey returns. This resulted in a total of 288 surveys that were either complete or mostly completed, and therefore usable. A revised Raosoft (2004) calculation of sample adequacy was done by increasing the sample size by 18. This had the effect of improving the confidence level to 91% from its original 90%.

In the determination of whether or not to use or discard incomplete surveys, it is important to note that Section B related to questions about the respondents' own unions. As such, unaffiliated respondents did not, as a general rule, respond to question items 7 through 24. These were not considered incomplete, and were included in the overall survey data. It should be noted though that some of the unaffiliated respondents did complete all, or some of the question items between 7 and 24, and their responses were duly recorded.

Although clearly indicated as the attitudes and perceptions of unaffiliated members, a reduced number of responses are naturally included, potentially reducing the frequency of the sample, and potentially distorting percentage figures of frequency. This should be borne in mind when viewing the data results.

Kumar (2014) outlines the next phase of data processing as coding. In order to ensure that items are correctly coded, it is important to understand the scales that the various question types utilised (Ibid). A total of 29 quantitatively measured questions were used, with the first six closed questions using discrete nominal or ordinal categories (McMillan & Schumacher, 2010).

The 23 Likert scale matrix statements utilised response category options that were equidistant from one another (Carifio & Perla, 2007). The maintenance of a stable interval between response options was done in order to avoid bias in one direction or another (McMillan & Schumacher, 2010), and two different poles, namely strongly agree, or strongly disagree, with milder or neutral options were provided as response categories. As such, the Likert questions were deemed to use interval, as opposed to ordinal scale (Ibid).

All closed and Likert scale question responses were numbered on the survey instrument itself, so coding was not required for these question types. Simple data capture into a spreadsheet of the associated number selected was therefore used for Items 1 through 29.

Use of the one open question (see Item 30) did, however, require a coding process. A simple analysis of the themes and nature of comments received was made, and a code book was created to arrange statements into particular coded areas (see Addendum B). The purpose of the open question, that is, to alleviate frustrations and to allow teachers to amplify on any attitudes or perceptions that they have towards or about teacher unions, should, however, be considered here. As such, the open question was not analysed as part of the main data set, and serves only a descriptive, non-generalisable function.

Once coding and cleaning were complete, data from the 288 complete or partially-complete surveys were manually captured on a Microsoft Excel sheet, titled 'Data'. Fifty-eight surveys (20% of the returned surveys) were randomly double-checked against the sheet to ensure accuracy of the captured entries. Two data entry errors were detected and corrected.

During data capturing, it was noted that just one survey had been returned from an NUE member, and that three surveys had been returned from members of 'Other unions'. It is important not to project data to groups that did not respond (eSurveysPro, 2014) or that were not suitably represented.

As such, to avoid skewing the results, which are presented as percentages in the sections below, the decision was taken to exclude any union with a return rate lower than 5 surveys as units of analyses. The values in the returned surveys were, however, retained in the overall counts.

For the analysis of descriptive data such as that garnered for this study, univariate analysis is the most commonly adopted approach (McMillan & Schumacher, 2010), and is suitable for summarising data that has a single characteristic or variable. In the case of this study however, the opinions of four individual units of analysis were obtained for each statement or question examined. McMillan and Schumacher (2010) suggest therefore that where two variables are used for correlation purposes, or where different groups are compared, it is bivariate analysis that should be employed. For this reason, a combination of univariate and bivariate analysis was used (McMillan & Schumacher, 2010) for this study. The purpose of the study remains, however, a descriptive one, and so inferential statistics were not utilised.

Univariate procedures used in this study include frequency distribution, percentages, histograms, mean, median and modes, as well as standard deviations (McMillan & Schumacher, 2010). For bivariate analysis, comparisons between percentages, means, medians and modes were drawn (Ibid).

Various Excel formulae were used to calculate descriptive statistics of the six biographic questions and 23 closed Likert-scale questions, and also to extract specific, summarised data onto a separate Microsoft Excel sheet, titled 'Thematic points' (see Addendum B for a summary table of these). Use of formulae mitigated the risk of data entry errors that may have arisen from further manual entry and/or extraction onto new spreadsheets.

The design of the questionnaire explored six themes, as indicated in Table 2 below. The analysis of the data was ultimately sorted into these themes and then aligned to the three research questions.

Table 2: Research Themes

Themes Investigated	Item Number (see Addendum B for detail)
1. Union fees	B07; B08
2. Union benefits	B09; B20; B21; B22; C25; C26; C28
3. Strike action	B13; B14; C27
4. Teaching and learning	B15; B16; B17; B18; B19
5. Performance evaluation	B19
6. Union membership	A01; A02; A03; A04; A05; A06; B10; B11; B12; B23; B24; C29

Both the 'Data' and 'Thematic points' sheets were used to inform the generation of descriptive statistics and various graphic devices. Cronbach's alpha was used to examine the internal scale reliability and the consistency (McMillan & Schumacher, 2010) of the Teaching and Learning theme, which included five questions, and thus offered suitable provision for this calculation (Ibid).

For ease of use, data was rounded off as whole numbers and indicated as both percentages and values on the 'Data' sheet summaries. It was, however, restricted to contextualised percentages on the 'Thematic points' sheet and in presenting data in this report. Another important reason for use of percentages in the reporting sections was due to the stratified sample used, and the differences in unit of analysis response numbers (McMillan & Schumacher, 2010). The graphic devices therefore, unless otherwise noted, reflect the percentage of each unit of analysis, and not the actual frequency.

Chapter 4: Data Presentation & Analysis

4.1. Introduction

Mouton (2009) suggests that regardless of the nature of the data collected, all research ultimately requires the analysis and interpretation of data sets in some form or another. The data analysis chapter therefore provides a vehicle for testing collected data for areas of '…convergence, commonality or divergence' (Nenty, 2009:29), and should aim to describe and interpret the results without further comment or elaboration (Ibid).

For a descriptive quantitative study such as this one, it is necessary to deconstruct data points into logical, useful themes and relationships in order to respond to the three research questions posed. Although the data will be discussed in detail with relation to the research questions in Chapter 5, in order to consider the data meaningfully within the identified themes, the goal of this study must necessarily be borne in mind throughout the process of data analysis.

This study's purpose was to extend the quantitative literature on South African teacher unions and, more specifically, to determine:

- What attitudes and perceptions teachers exhibit about South African teacher unionism in general;
- What particular aspects of teacher unionism teachers of different unions support and/or reject; and
- Whether teacher perceptions and attitudes support or contradict the conclusions of current South African case study literature on teacher unions.

This Chapter will provide a brief demographic profile of the respondents and present descriptive data yielded from the completed surveys. Measures of central tendency and dispersion are included in order to highlight what Nenty (2009:29) calls areas of '… convergence, commonality or divergence…'.

4.2. Demographic profile

An outline of the demographic data collected is included for the purposes of developing a profile of the sampled educators and to determine whether or not the sample is to some degree representative of the population of unionised Gauteng teachers as a whole.

After capturing and initial analysis of the data for Item A06, which obtained the stated union affiliation of respondents, the researcher was able to identify the relevant units of analysis for the study. As indicated in Chapter 3, units of analysis were created by union-affiliation, and included only those unions with more than five returned responses. The final units of analysis were, as such:

- SADTU respondents ($n_1 = 98$)
- NAPTOSA respondents ($n_2 = 142$)
- SAOU respondents ($n_3 = 19$)
- Unaffiliated respondents ($n_4 = 25$)

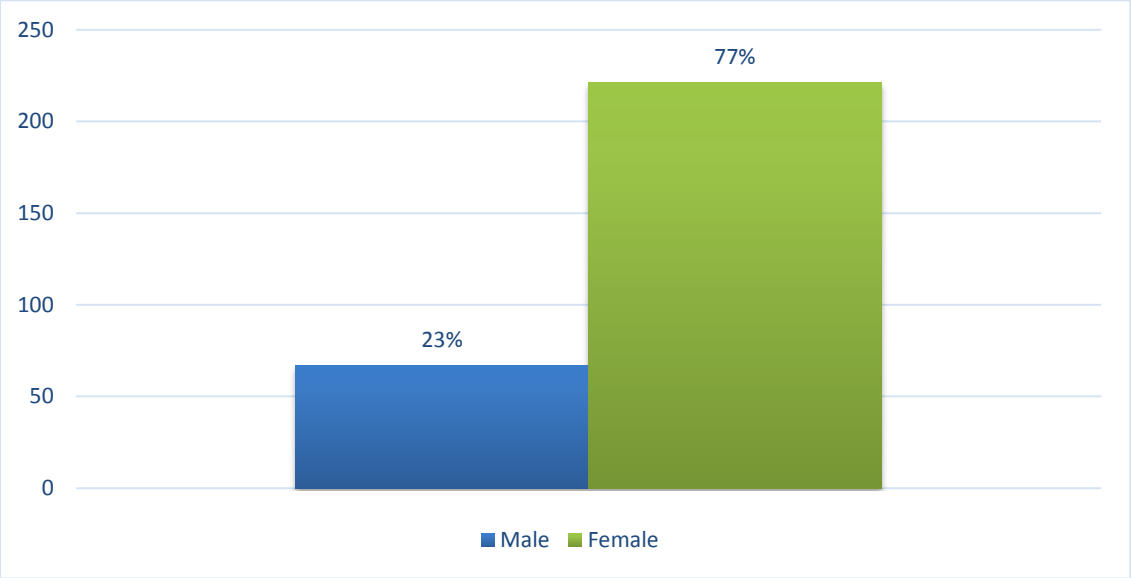
Only one survey was returned for the NUE, and three additional surveys were allocated to the 'Other union' category. These were excluded as units of analysis due to the five-survey-minimum criteria, but included in the total counts.

With the exception of the membership heft, which, as is evident from the units of analysis above, leans significantly more towards NAPTOSA than SADTU in this study, the sample appears similar in gender, age and experience to official data relating to teachers in the Gauteng region (DBE, 2012), and thus offers a degree of sample reliability. Further details of the demographic profile items (A01 – A06) are included in the sections below.

4.2.1. Gender

A total of 221 females, and 67 males participated in this survey. Figure 1 below depicts a gender ratio that is 5% higher in female respondents than is reflected in official DBE (2012) figures.

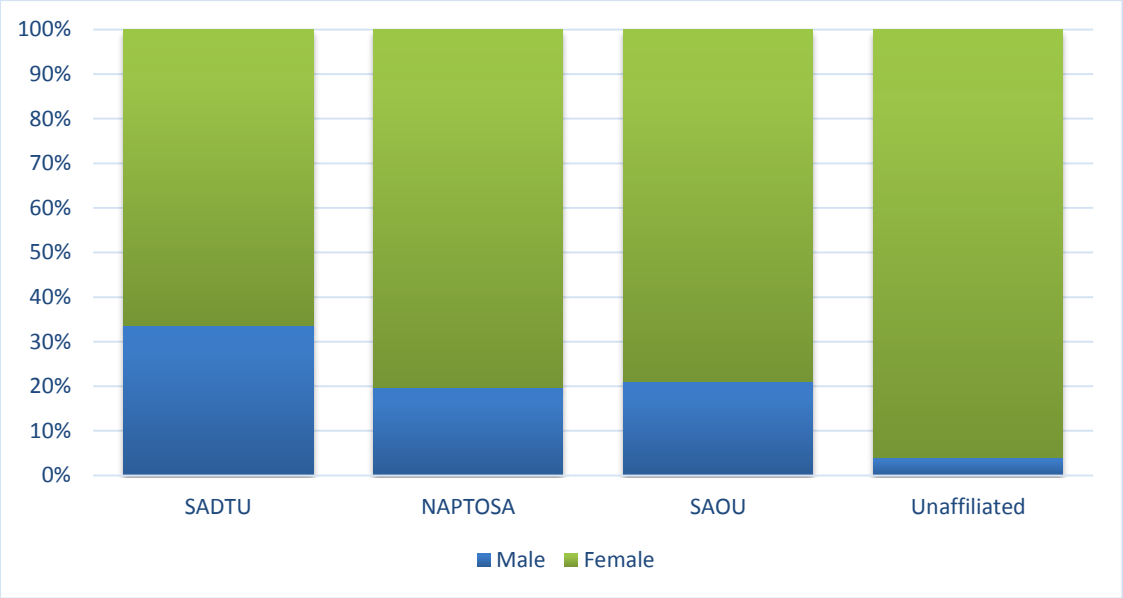
Figure 1: Gender profile of total sample



This trend notwithstanding, while the sample does yield more female teachers than the DBE's (2012) official figures, the sampled respondents are still reasonably representative of the official gender distribution.

Interestingly, examining gender on a unit analysis basis in this study, SADTU reflects a higher ratio of male members than do any of the other unions, including unaffiliated respondents. In contrast with the total SD of 108.19 for the gender item, SADTU's SD is just 22.63. While all other unions sampled indicated male membership of 21% or under, which is in keeping with the gender ratio reported by the DBE (2012), a notable 34% of respondents who indicated that they belonged to SADTU in this study, also indicated that they were male (see Figure 2 below).

Figure 2: Gender profile by union*



* Unions with fewer than 5 survey returns are excluded from this figure.

Possible reasons for the slightly heavier female-heft in respondents and the variance in SADTU gender are discussed in Chapter 5.

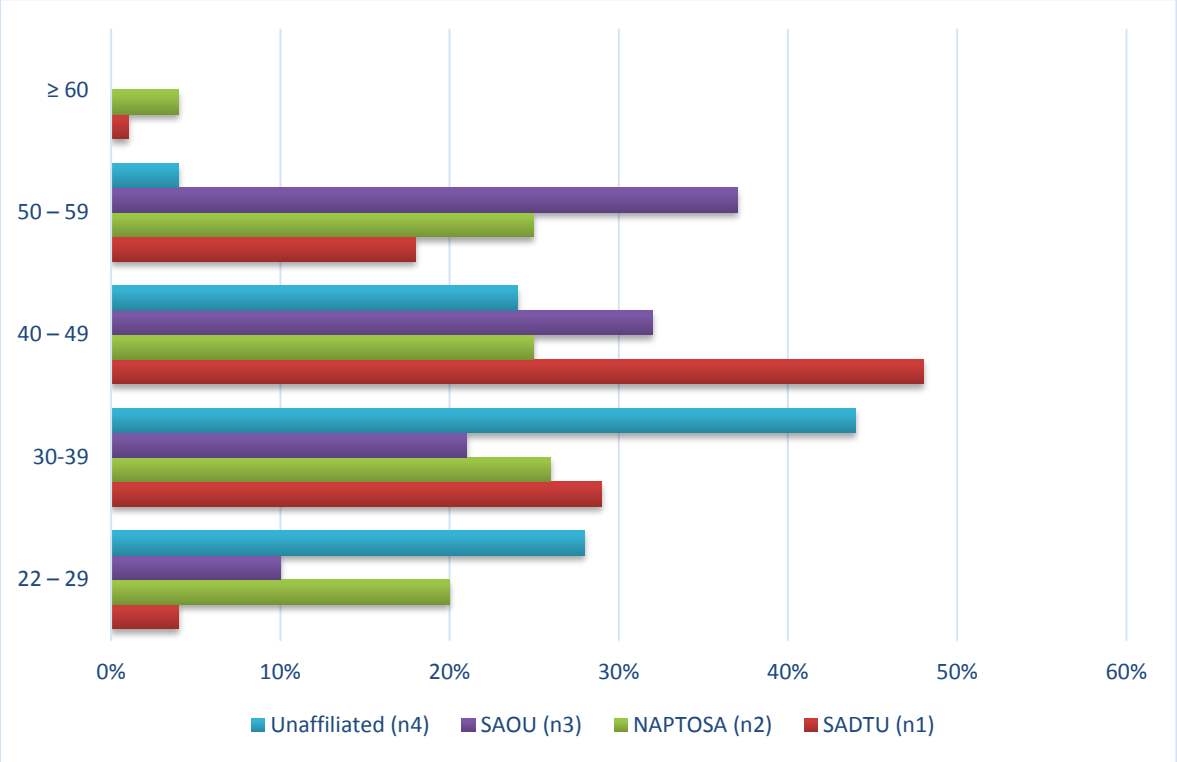
4.2.2. Age

Item A02 of the survey questionnaire asked respondents to identify their ages by selecting from six age categories. Responses ranged between 22 years of age to 60 or older, with zero respondents selecting the 21 or younger category.

The modal age category of the total sample is 40 – 49 (with 96 total incidences), with the next most frequently occurring category being the 30 – 39 age group (with 81 incidences). This does not, however, adequately indicate the individual trends within each union, since stark differences exist across the represented unions. This variance is evinced by the total sample SD of 39.12 across the age categories.

Figure 3 below indicates the frequency distribution of the sample group by age category across the unions.

Figure 3: Age profile of sample by union



* Unions with fewer than 5 survey returns are excluded from this figure.

As is evidenced in *Figure 3*, there are differences across the different units of analysis in terms of age make-up. In the SAOU, the majority of members fall into the 50 – 59 category, making this union home to the oldest respondents in this study. This is contrasted with an overwhelming proportion (72%) of unaffiliated respondents falling into the 22 – 29 and 30 – 39 categories, making unaffiliated respondents the youngest of the sample group. The possible reasons for and implications of this will be elaborated on in Chapter 5.

4.2.3. Experience profile of sample

Item B04 of the survey questionnaire required respondents to identify the length of their experience by selecting from five category-based options. The range extended from less than one year's experience to more than 20 years' experience, with the mode identified 10 – 19 years' experience. As with the age category, the sample standard deviation indicates a wide variety in responses across the total sample, and notable differences within the sampled unions themselves.

Table 2 below indicates the frequency distribution of the sample group in terms of experience. Note the differences in experience between unionised respondents and non-unionised respondents, which will be discussed in more detail in Chapter 5.

Table 3: Experience profile of sample

EXPERIENCE	< 1 year	1 – 3 years	4 – 9 years	10 – 19 years	≥ 20 years	Mode (years)	Sample SD (S)
SADTU	0%	4%	13%	55%	28%	10 - 19	21.85
NAPTOSA	4%	13%	15%	35%	33%	10 - 19	18.81
SAOU	5%	0%	21%	11%	63%	≥ 20	4.82
Unaffiliated	12%	16%	56%	4%	12%	4 - 9	5.15
TOTAL	**3%**	**9%**	**18%**	**39%****	**31%**	**10 - 19**	**41.61**

* Unions with fewer than 5 survey returns are excluded from this figure.

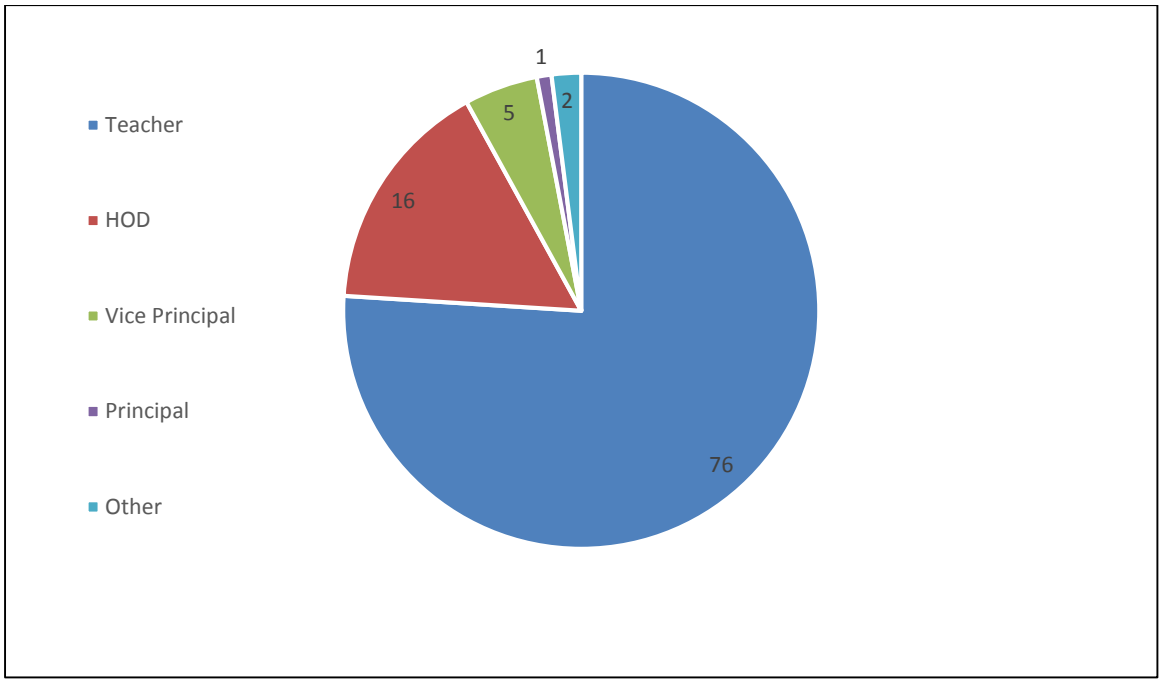
** Percentage adjusted up by ± 1% to resolve rounding up of data

4.2.4. Official post profile of sample

Data analysis of Item A03 indicates, as expected, that the modal position at the sampled schools is that of teacher, with 218 of 288, or 76% of respondents indicating this as their official post. A further 45 (16%) respondents indicated their position as Head of Department, while just 18 respondents identified themselves as vice principals and principals, and so made up 6% of the sample

The surveyed range categories, from teacher to principal, were extended by adding the category of 'Other' to cater to teacher aids etc. Table 2 provides a visual summary of the question relating to official position.

Figure 4: Post level profile of sample



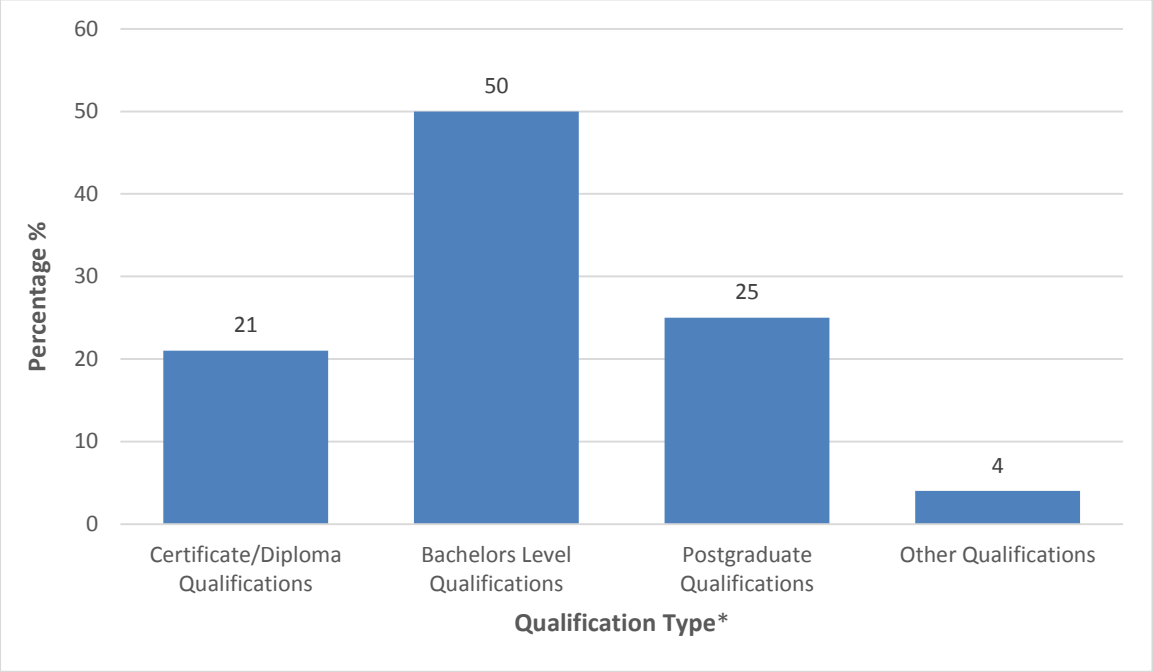
4.2.5. Qualifications

An analysis of given responses to Item A05, in which respondents were asked to indicate their highest academic qualifications by selecting from 12 options, reveals that 79% of the respondents in this study are qualified, or possess qualifications in excess of the minimum standards required for current registration requirements of the South African Council for Educators (SACE, 2011).

The bimodal qualifications held by respondents are at the Bachelor degree level, with approximately 50% of the sample reporting possession of either Bachelor degrees or Bachelor degrees with postgraduate teaching diplomas. There is, however, a wide spread of qualifications represented in the sampled union members, as is evident from the total standard deviation figure of 25.4 for this item.

Figure 4 below provides a summary of the data provided by the respondents.

Figure 5: Qualification spread of sample



* Qualification ranges have been consolidated by type for the purposes of this summary.

Sixty-four percent of SADTU-affiliated respondents, 81% of NAPTOSA-affiliated respondents, and 84% of SAOU-affiliated respondents in this study met the current minimum standards of a qualification at REQV 14 for registration with SACE (2011).

Qualifications in excess of minimum requirements were most evident in SAOU (32%) and NAPTOSA (30%), but were also seen in SADTU (20%) and, to a lesser degree, in the unaffiliated respondents' indicated qualifications (16%).

Of those who indicated M +2 or National Diploma as their highest qualification, that is, those who do not meet the current registration requirements for SACE (2011), 70% indicated that they had in excess of 10 years' experience, with the majority of these (38%) having more than 20 years' experience.

Four percent of respondents selected 'Other' for this item, reflecting a scope of certificates and degrees, including one in Physiotherapy.

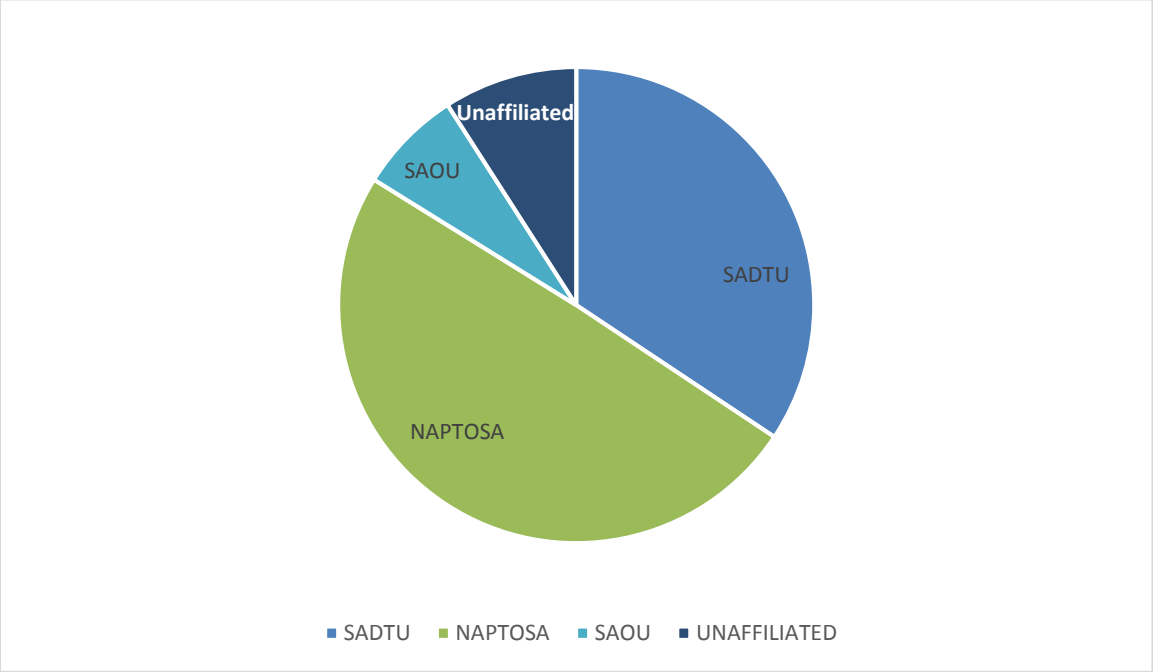
Findings for this item will be discussed in further detail in Chapter 5.

4.2.6. Union membership

Analysis of responses to Item A06, which asked respondents to identify the union to which they belong, yielded the unexpected result – given the initial probability stage of sampling - that NAPTOSA-affiliated members outnumbered SADTU member responses by a significant percentage. A total of just 34% of respondents indicated a SADTU-membership ($n_1 = 98$), while 49% indicated a NAPTOSA membership ($n_2 = 142$). The only other significantly represented union was the SAOU, which 7% of respondents ($n_3 = 19$) indicated an affiliation with. A total of 9% of respondents ($n_4 = 25$) indicated that they were not affiliated with any union, but that they pay compulsory monthly union fees.

Figure 4 below provides an outline of the reported union-affiliations of the 288 respondents.

Figure 6: Union-affiliation profile of sample



* Unions with fewer than 5 survey returns are excluded from this figure.

The findings related to union membership were therefore unexpected, but are discussed in detail under the union membership theme in Chapter 5.

4.2.7. Demographic profile summary

As is evidenced from the above findings, the modal respondent in this study is a female, Post Level 1 teacher between the ages of 40 to 49. 'She' is a NAPTOSA member in possession of a Bachelor's degree in Education, and evinces between 10 to 19 years' of teaching experience.

It is, however, important to consider the differences both within and between units of analysis and to remember that despite clear modes in many cases, the sample is not a homogenous one. Outliers within each unit of analysis are evident in the standard deviations, and the deliberate attempt to source respondents from different unions has, in some cases, resulted in a wide spread of attitudes and perceptions.

Finally, as outlined earlier in this Chapter, and as is discussed in more detail in Chapter 5, certain findings appear inconsistent with official data and so require further exploration before any extrapolation to a larger population is possible.

The following sections of this report (Section 4.3; Section 4.4; Section 4.5) describe the findings of responses to range statement questions 7 to 29 in relation to attitudes and perceptions to teacher unionism in general, to particular aspects of unionism that teachers support or reject, and to areas of overlap with current qualitative literature.

4.3. Attitudes and perceptions about South African teacher unionism in general

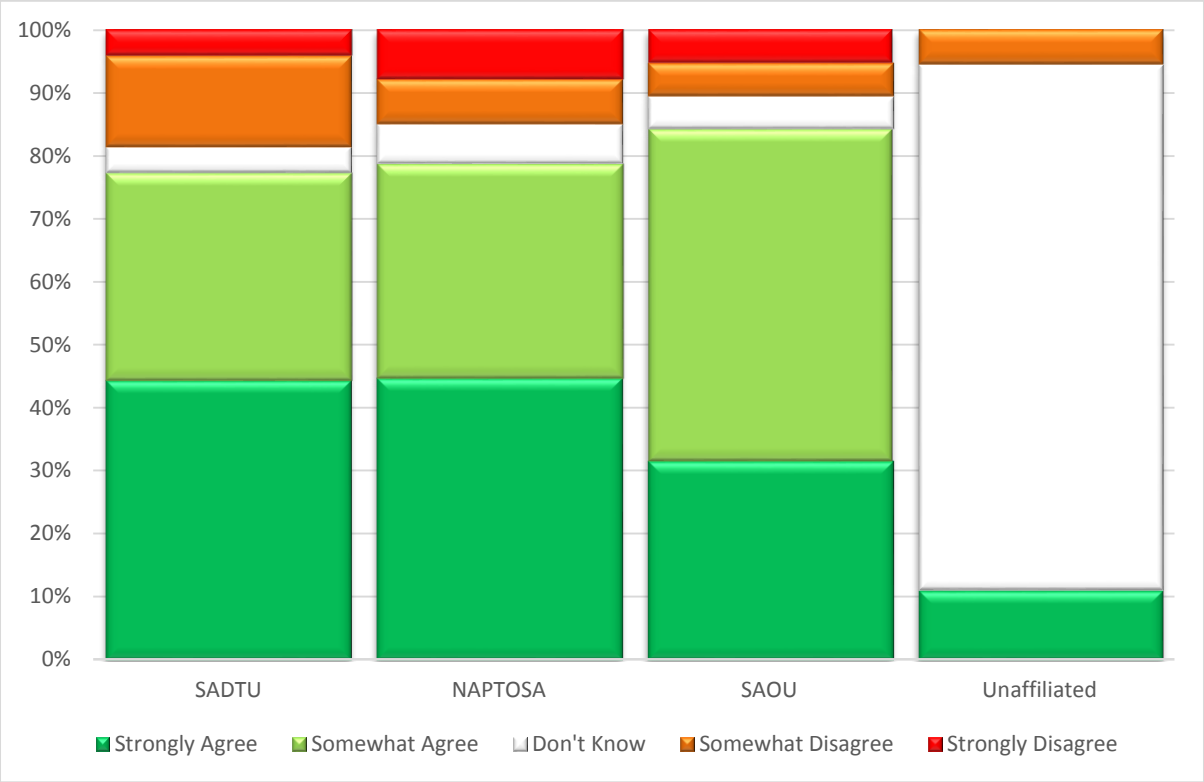
Section 4.3 describes the findings related to the attitudes and perceptions of respondents in relation to South African teacher unionism in general. It describes four research themes and related items, including attitudes towards union fees, benefits, membership, strike action, and teaching and learning, as outlined in *Table* 1, Section 3.5.

In order to aid readability in this section, figures or tables are used to provide summaries of the responses to questions. Measures of central tendency are indicated and, where useful, significant variances are highlighted.

4.3.1 Perceptions of and attitudes towards union fees

One of the more unexpected results of this study was the finding that a significant majority (74%) of respondents in this study view their prescribed union fees as affordable. Little differences in response are evidenced here between SADTU, NAPTOSA and SAOU, with Figure 5, which summarises responses to Item B07, showing that just 15% of those sampled indicated that they disagreed, either strongly or to some degree, that their union fee was affordable.

Figure 7: View on affordability of union fee by union



* Unions with fewer than 5 survey returns are excluded from this figure.

The largest Standard Deviation (SD) for this item across the units of analysis was for NAPTOSA-affiliated members. With an SD of 25.49, in comparison with SADTU at 17.46, and SAOU at 4.09, NAPTOSA-affiliated members demonstrated the widest variation in responses to this item.

Surprisingly, 88% of unaffiliated sample respondents who did answer this question reported that they were unsure whether or not their union's fee was affordable. Given that public educators are obliged, for the purpose of collective bargaining agreements, to contribute to a teacher union regardless of their lack of affiliation, this is an unexpected response that perhaps suggest a lack of awareness of the actual fee, or of the fact they are paying fees at all.

Item B08 attempted to obtain respondents' perceptions with regards to value-for-money from the unions. The caution to this question's results is that the nature of 'value-for-money' is a subjective phrase, and so may be interpreted differently by different respondents. That said, the majority of respondents, at 64%, indicated some or strong agreement with the statement as is evidenced in Table 3 below.

Table 4: Frequency distribution of perceived value for money from union

Perceived value for money	Strongly or somewhat agree (%)	Don't Know (%)	Strongly or somewhat disagree (%)	Mode	Sample SD (S)
Total	**64**	**15**	**22**	**Somewhat Agree**	**32.97**

4.3.2 Perceptions of and attitudes towards union benefits

For the purposes of this study, union benefits featured as a major theme of analysis. Seven statements were included for discussion under this Research Question, namely Items B09; B20; B21; B22; C25; C26 and C28.

For Item B09, which asked respondents to identify the extent to which they support the statement that their union protects them from unfair treatment in the workplace, the majority of responses were in agreement, either strongly or to some degree (58%).

Table 5 below provides a summary of responses according to the four units of analysis to this question. Note the small SD of SAOU-affiliated members' responses, and the increased levels of satisfaction of these members in comparison with NAPTOSA- and SADTU-affiliated respondents.

Table 5: Frequency distribution of perceived protection from unfair treatment

Protection from unfair treatment	Strongly or somewhat agree (%)	Don't Know (%)	Strongly or somewhat disagree (%)	Mode	Sample SD (S)
SADTU	67	16	15	Somewhat Agree	13.61
NAPTOSA	55	33	12	Somewhat Agree	19.40
SAOU	84	5	11	Somewhat Agree	4.44
Unaffiliated	15	80	5	Don't Know	6.75
Total	**58**	**28**	**14**	**Somewhat Agree**	**32.97**

* Unions with fewer than 5 surveys are not included in this table

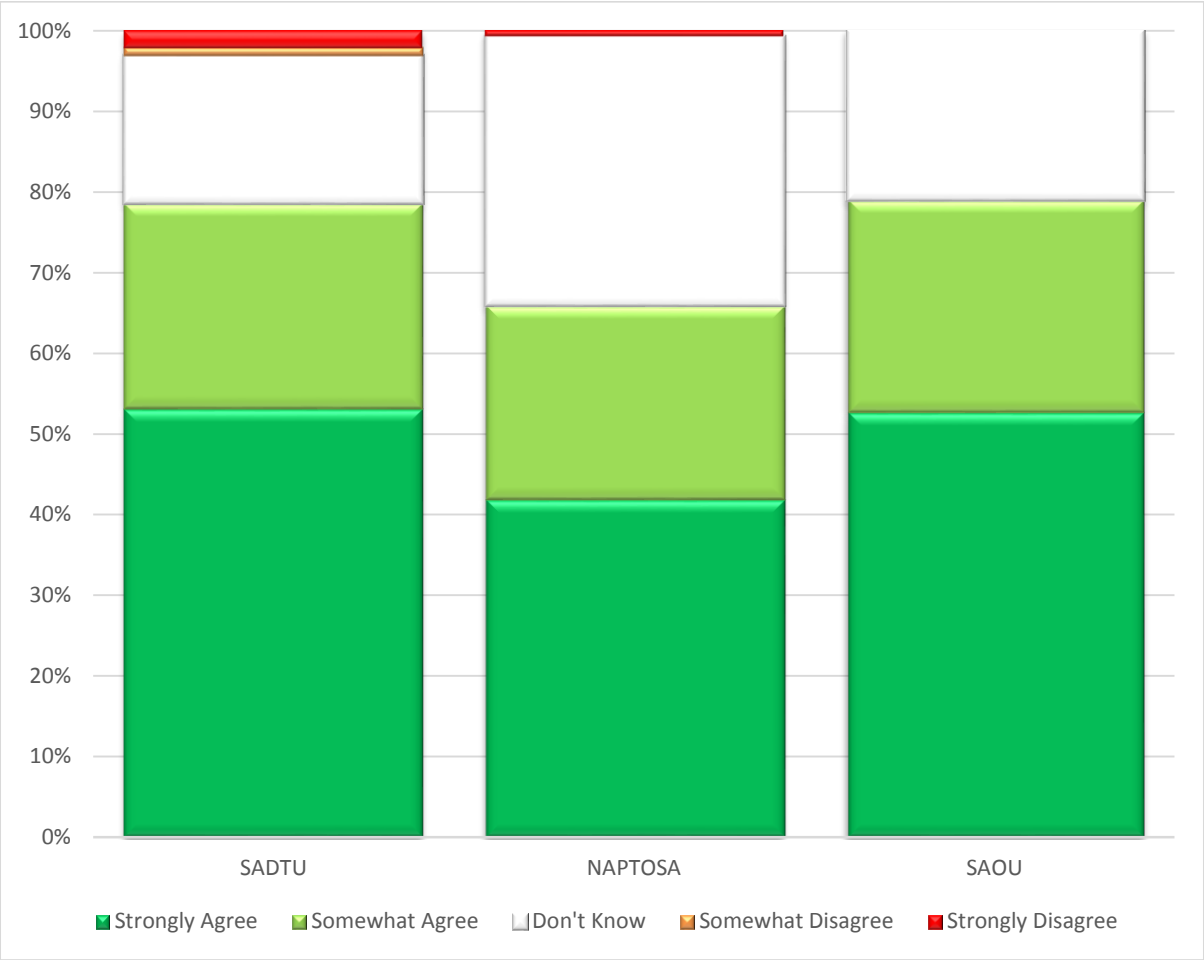
Overall, these positive responses suggest that educators perceive an ability and/or willingness of their teacher union to protect them from unfair treatment in the workplace.

Approximately 80% of unaffiliated respondents indicated that they did not know whether or not the union protects them from unfair treatment in the workplace. Given that these individuals pay fees but do not belong to any particular union, the high incidence of this response for this unit of analysis was expected. The few negative and positive responses by this group of respondents was, however, anomalous since the only protection afforded them would be to collective bargaining agreements.

In response to Item B20, which asked respondents to agree or disagree with the statement that their union would provide them with legal representation or advice in the case of disciplinary action, 75% of unionised respondents indicated agreement.

Figure 7 below again highlights that the majority of respondents, across all units of analysis, agreed with the statement, with fewer than 1% of respondents disagreeing. The selection of the neutral category by unaffiliated respondents is again an expected result. The three affirmative responses received by the unaffiliated sample was, however, also anomalous.

Figure 8: Perceptions of union ability or willingness to provide legal representation/advice in cases of disciplinary actions



* Unions with fewer than 5 surveys, and unaffiliated respondents are not included in this figure

Responses to Item B21, which sought agreement or disagreement with the statement that teacher unions assist their members in obtaining promotions, varied across the range, with approximately 27% agreeing strongly or to some degree, and 27% disagreeing strongly or to some degree. Significantly though, almost 47% of respondents indicated no awareness of whether or not their union assists its members in gaining promotions. This finding will be discussed in more detail in Chapter 5.

The wide range of responses recorded for this Item, evidenced by an SD of 43.21 may be seen in summarised form in Table 6 below.

Table 6: Frequency distribution of perceived assistance by unions in the promotion of members

Involvement in promotions of members	Strongly Agree (%)	Somewhat Agree (%)	Don't Know (%)	Somewhat Disagree (%)	Strongly Disagree (%)	Mode	St. Dev.
Total	**13%**	**12%**	**47%**	**11%**	**16%**	**Don't know**	**43.21**

For Item B22, respondents were asked to agree or disagree with the statement that they would not be given salary increases without the negotiations of their unions. As indicated in Section 3.5 the framing of this statement in the negative may have caused some confusion, and would need to be revised for any future studies.

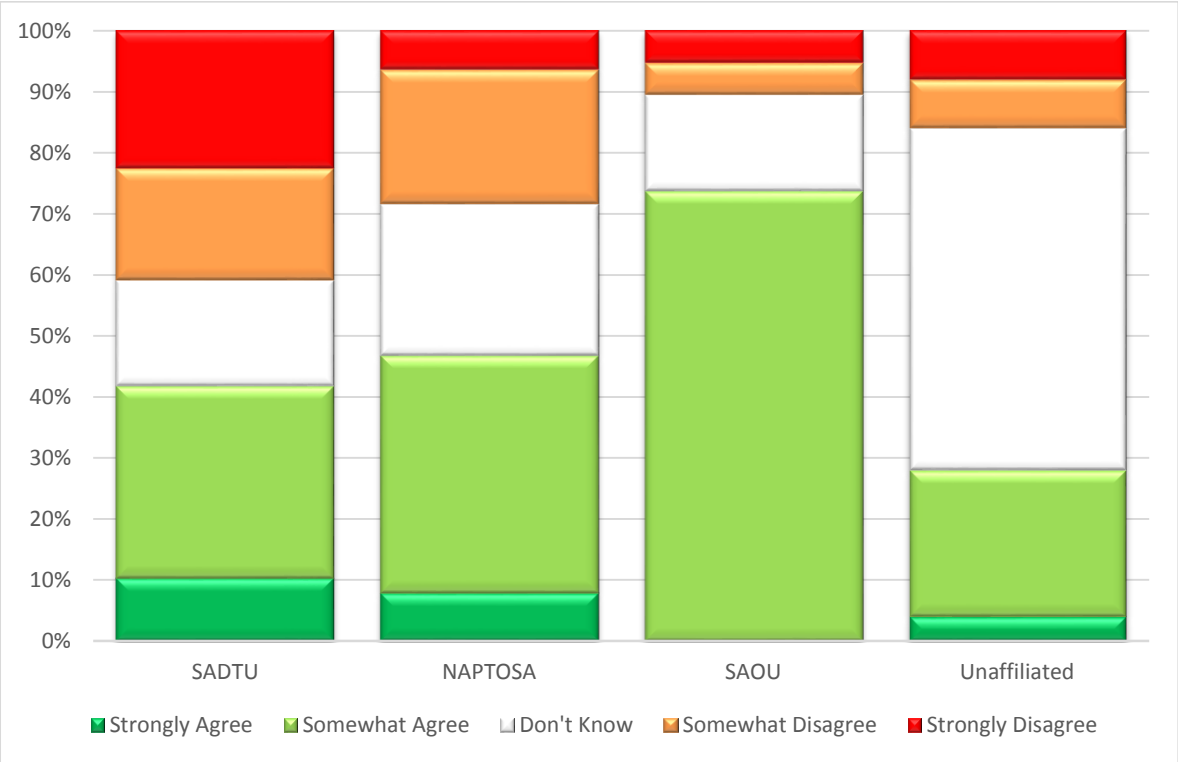
That said, responses to this statement yielded evincing support for idea that unions are seen by teachers as pivotal in the successful negotiations of their salaries, as is evidenced in Table 7 below. As is also plain in Table 7 however, a considerable portion of the sample (26%) across all unions averred a lack of knowledge about this statement.

Table 7: Frequency distribution of perceived influence of teacher unions on salary negotiations

Salary negotiations	Strongly Agree (%)	Somewhat Agree (%)	Don't Know (%)	Somewhat Disagree (%)	Strongly Disagree (%)	Mode	Sample SD (S)
Total	**29**	**31**	**26**	**9**	**5**	**Somewhat Agree**	**33.58**

Item C25 asked respondents to agree or disagree with the statement that teacher unions in South Africa are more focused on teacher benefits than on teacher development. As seen in Figure 8 below, a small majority (46%) of respondents agree with the statement, but there seems little uniform agreement, even within individual unions – SAOU-affiliated members being the exception.

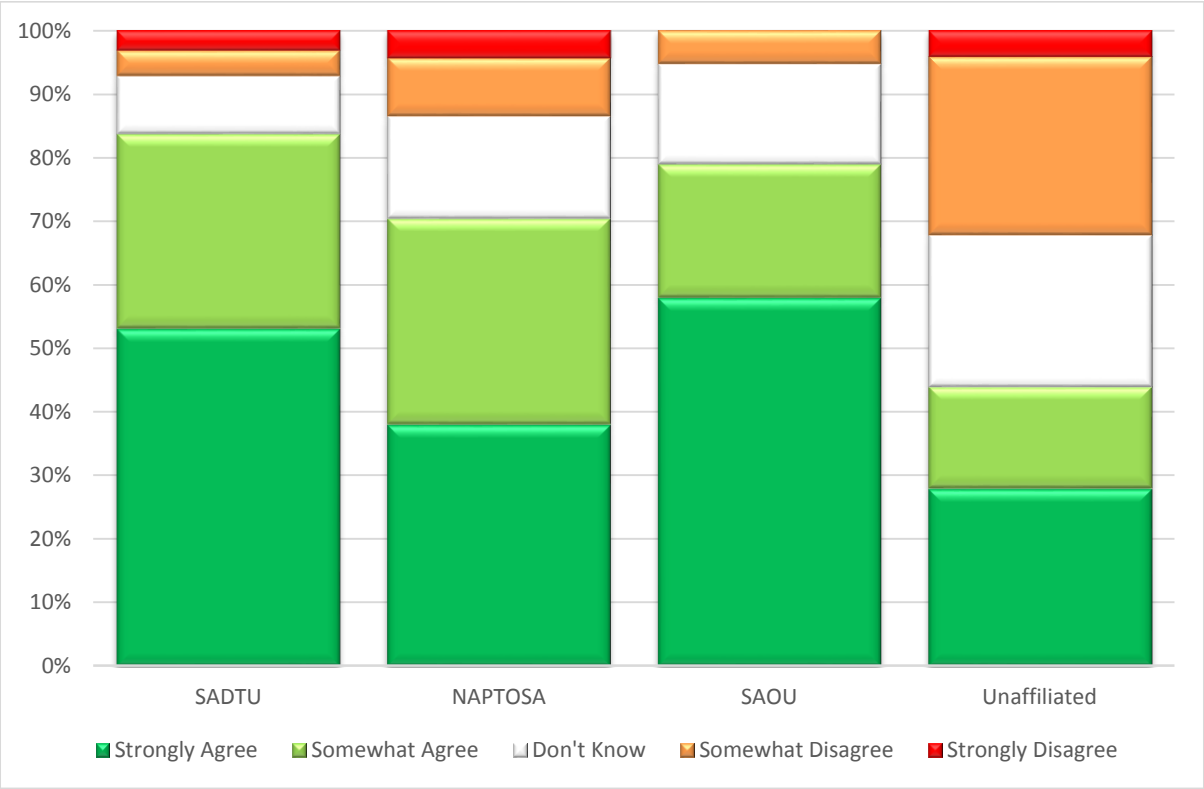
Figure 9: Perceptions of union emphasis on teacher-benefits over teacher development



* Unions with fewer than 5 survey returns are excluded from this figure

For Item C26, respondents were asked to respond to the statement that without strong teacher unions and federations, teachers would be treated unfairly by their employers. As seen in Figure 9 below, a strong 74% of all respondents agreed with the statement. This perception amongst respondents and its potential implication for trust in the South African government as an employer will be detailed in Chapter 5 in relation to qualitative union literature.

Figure 10: Perceived need for strong teacher unions and federations in preventing unfair treatment by employers



* Unions with fewer than 5 survey returns are excluded from this figure

The final item included for investigation under this research question was Item C28, which asked respondents to agree or disagree with the statement that some unions use their influence to unfairly promote their members.

As with the responses to the related item B21, there was little agreement in the indicated responses. Table 8 below demonstrates a total majority (52%) agreeing strongly or to some degree with the statement, but with the mode, at 35% of respondents, indicated as 'don't know'.

Table 8: Frequency distribution of perceived union influence on unfair promotion of members

Influence on unfair promotions	Strongly Agree (%)	Somewhat Agree (%)	Don't Know (%)	Somewhat Disagree (%)	Strongly Disagree (%)	Mode	St. Dev.
Total	27	25	35	7	6	Don't know	36.39

4.3.3 Perceptions of and attitudes towards union membership

This theme included just one item under the research question relating to attitudes and perceptions about teacher unionism in general. Item C29 asked respondents to agree or disagree with the statement that teachers should not be forced to belong to a union.

Use of negative phrasing of this question was not ideal, but given the alternative of having the statement framed positively (i.e. teachers should be forced to belong to a union), a negatively phrased, and thus less emotive statement, was deemed sensible for use. As mentioned in Section 3.5. though, the negative framing of the item may have confused respondents, and revision of this question may be required for any future studies.

Table 9 provides a frequency breakdown per unit of analysis, and which demonstrates a high degree (66%) of agreement with the notion of negative freedom of association.

Table 9: Frequency distribution of attitudes towards rejection of forced union membership

No forced membership (Q29)	Strongly Agree (%)	Somewhat Agree (%)	Don't Know (%)	Somewhat Disagree (%)	Strongly Disagree (%)	Mode	Std. Dev.
SADTU	47	24	5	11	12	Strongly Agree	16.29
NAPTOSA	40	23	4	13	20	Strongly Agree	18.98
SAOU	37	21	11	11	21	Strongly Agree	2.05
Unaffiliated	40	20	16	8	16	Strongly Agree	3.00
Total	**43**	**23**	**6**	**12**	**17**	**Strongly Agree**	**40.36**

* Unions with fewer than 5 survey returns are excluded from this table

4.3.4 Perceptions and attitudes towards the role of the union in teaching and learning

One of the major areas in which unions play, or can play a role, is in the teaching and learning space. To differing degrees, each union has a particular focus. The items used to glean information about the perceived role of unions in teaching and learning include items B15; B16; B17, and B18.

Responses to Item B15, which asked respondents to agree or disagree with the statement that their union plays a positive role in developing education policy in South Africa, indicated that a majority of respondents (66%) perceive their union as playing a role in this, as can be seen in Table 11 below.

Table 10: Frequency distribution of perceived positive union role in development of South African education policy

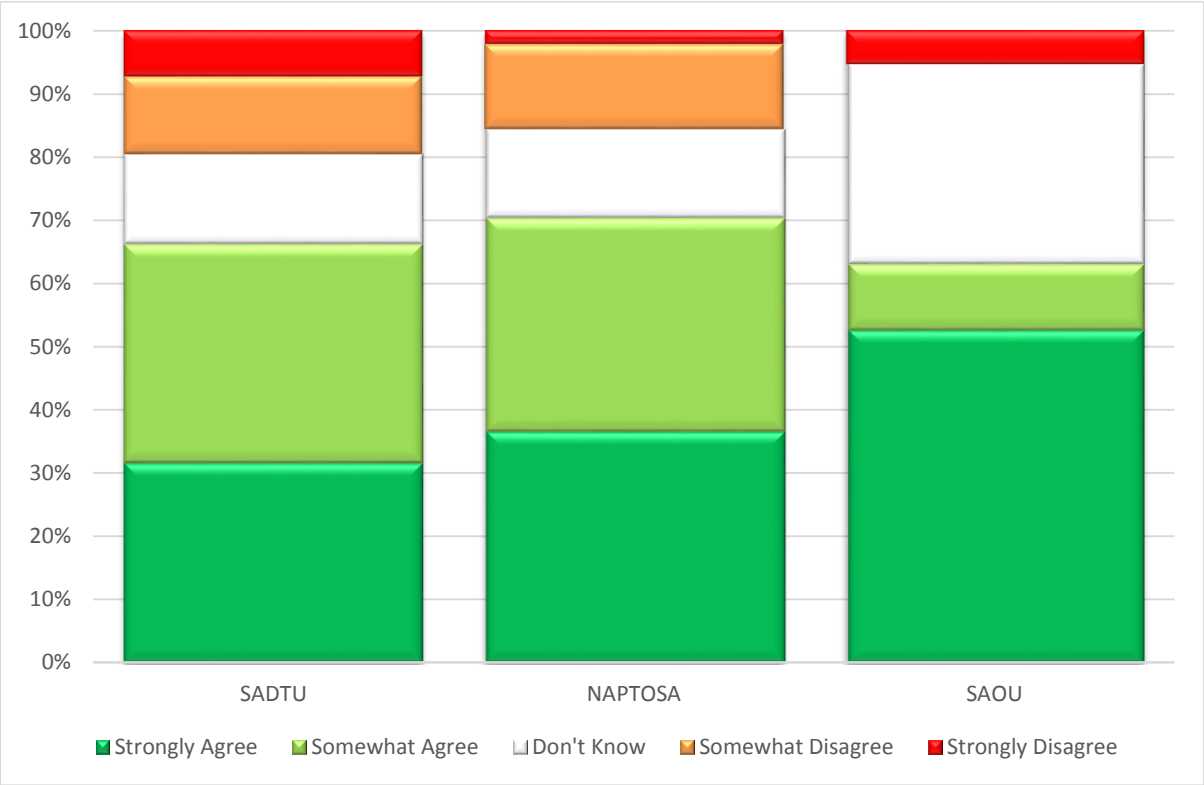
Union Role in Education policy	Strongly Agree (%)	Somewhat Agree (%)	Don't Know (%)	Somewhat Disagree (%)	Strongly Disagree (%)	Mode	St. Dev.
SADTU	31	33	16	14	6	Somewhat Agree	11.08
NAPTOSA	32	42	21	4	1	Somewhat Agree	24.56
SAOU	42	37	16	5	0	Strongly Agree	3.56
Unaffiliated	5	5	89	0	0	Don't Know	7.40
Total	**30**	**36**	**24**	**7**	**3**	**Somewhat Agree**	**40.36**

* Unions with fewer than 5 survey returns are excluded from this table

Of the union-affiliated units of analysis, SADTU-affiliated respondents were least likely to agree with the statement, while SAOU-affiliated respondents demonstrated the highest level of belief (79%) that their union played a positive role in education policy. A fair portion of respondents, most notably those from the unaffiliated group, indicated a neutral response as expected.

Item B16 elaborated on the role of unions in teaching and learning by asking respondents to agree or disagree with the statement that their union emphasises teacher development as a priority. Figure 12 below describes the response rates per unit of analysis, which again demonstrates a majority (66%) agreement with the statement across all three indicated units of analysis. For this item, Figure 12 displays no responses for unaffiliated responses due to fewer than 5 responses being received.

Figure 11: Perceived engagement of union in efforts to improve quality of education for learners



* Unions with fewer than 5 survey returns, and unaffiliated respondents are excluded from this figure

Item B17, which asked respondents to agree or disagree with the statement that their union emphasises teacher development as a priority also yielded interesting, if inexplicable, results. Table 12 below outlines the results per union, and again excludes unaffiliated members.

Table 11: Frequency distribution of perceived union emphasis on teacher development as a priority

Emphasis on teacher development	Strongly Agree (%)	Somewhat Agree (%)	Don't Know (%)	Somewhat Disagree (%)	Strongly Disagree (%)	Mode	St. Dev.
SADTU	28	45	12	11	3	Somewhat Agree	16.26
NAPTOSA	41	34	20	4	2	Strongly Agree	24.76
SAOU	47	32	16	0	5	Strongly Agree	3.70
Total	**35**	**36**	**21**	**6**	**2**	**Somewhat Agree**	**43.22**

* Unions with fewer than 5 survey returns, and unaffiliated respondents are excluded from this table

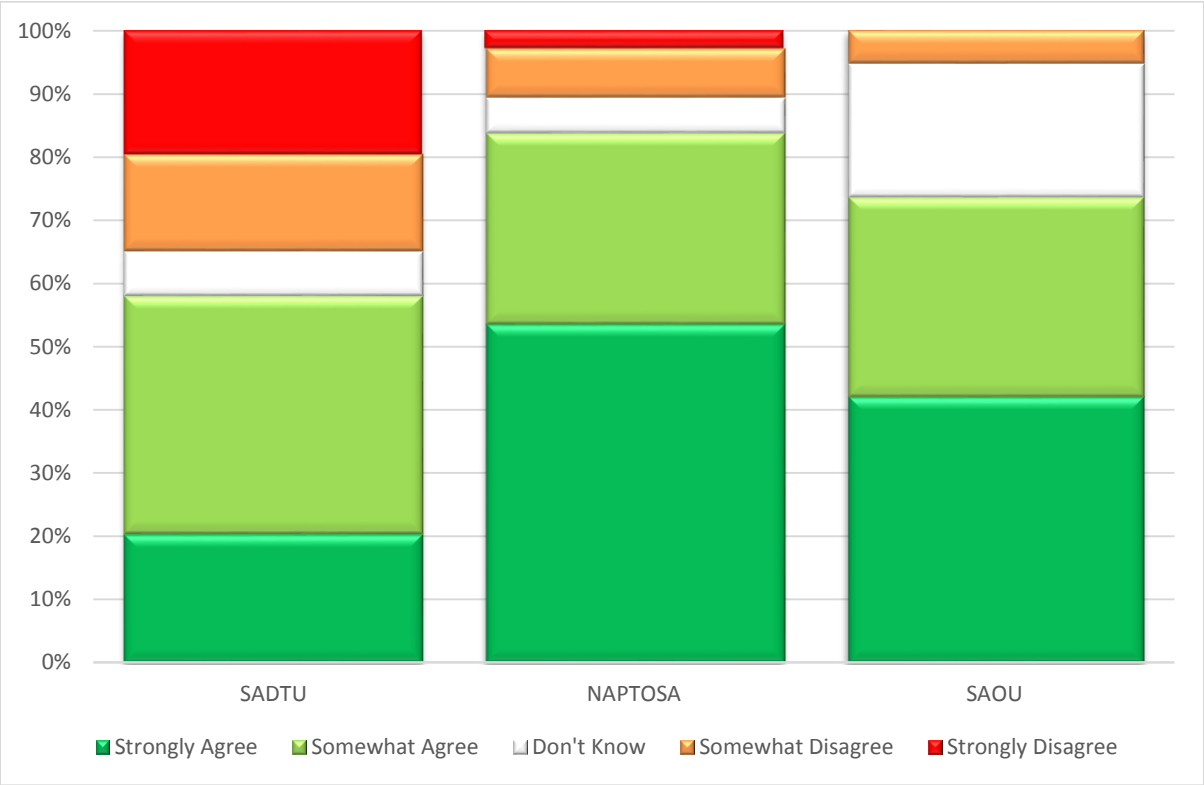
Again, SADTU-affiliated respondents indicate strong overall support (73%) for the statement, as do NAPTOSA (75%) and SAOU (79%) affiliated respondents. SAOU-affiliated respondents demonstrated the smallest SD at just 3.7, while NAPTOSA-affiliated respondents ranged to a larger degree with 24.76.

Again though, given the explicit focus of SADTU on teacher benefits (SADTU, 2013), the confidence with which SADTU-affiliated members support this statement item is potentially a surprising result, and will as such, be examined in further detail in Chapter 5 by evaluating current union Teaching and Learning endeavours available to teachers.

A final item analysed for teaching and learning (Item B18) under the first research question asked respondents to agree or disagree with the statement that their union provides useful teacher development workshops and/or other training and learning opportunities for teachers.

Figure 13 below summarises the findings related to this item, and indicates a 71% majority of support for the statement. Unaffiliated members have been excluded from the graphic.

Figure 12: Perceived union provision of useful teacher development workshops and/or other training and learning opportunities



* Unions with fewer than 5 survey returns, and unaffiliated respondents are excluded from this figure

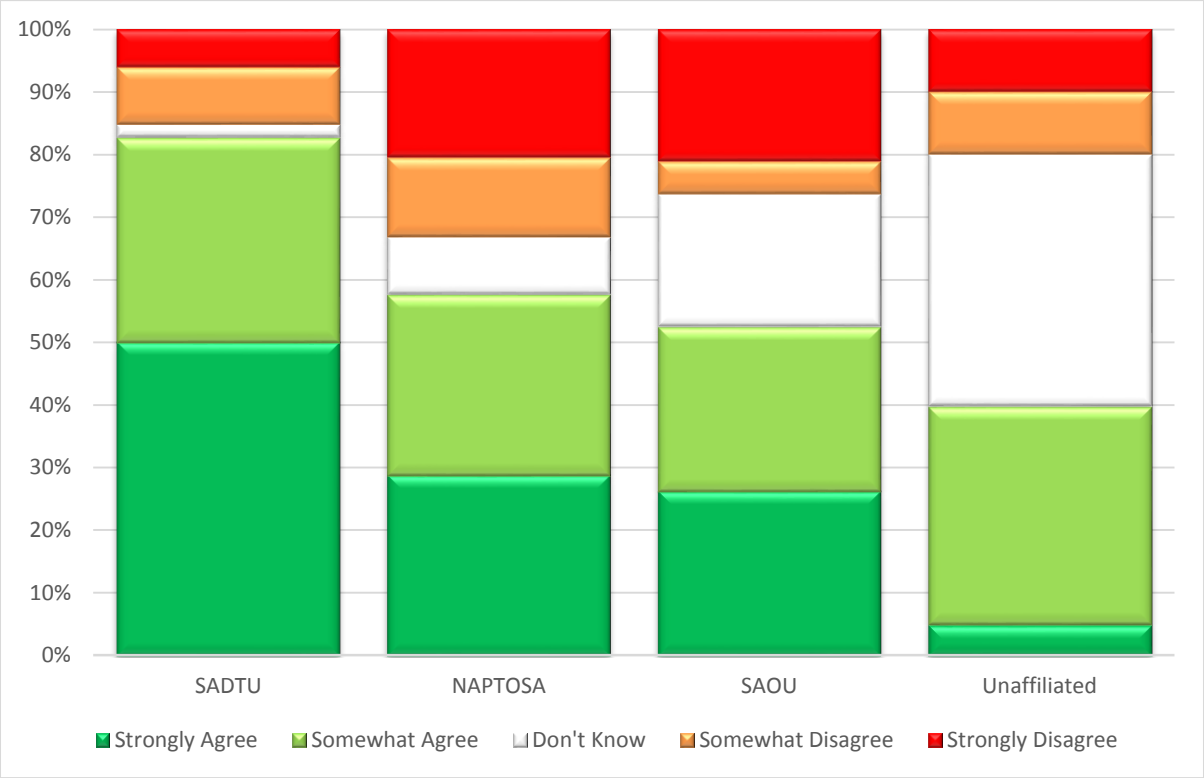
As is evident from the visual device, NAPTOSA-affiliated respondents overwhelmingly support the statement, with 84% of respondents in agreement. SADTU-affiliated respondents, while in majority agreement with the statement at 58%, do not appear as confident in their support as the members of NAPTOSA or SAOU, both of which evinced modes of 'strong agreement' in comparison with SADTU's 'agree somewhat' mode.

4.3.5 Perceptions and attitudes towards strike action

Perhaps the most surprising findings of this study are to be found in the items relating to strike action. For the purposes of exploring perceptions relating to this topic, three items, namely B13; B14 and C27, were used.

Item B13 asked respondents to agree or disagree with the statement that they support the use of protected strikes to see that union demands are met. Figure 10 below clearly indicates large degree (64%) of support for protected strikes, but variations in the units of analysis are evident.

Figure 13: Support for use of protected strikes to meet union demands



* Unions with fewer than 5 survey returns are excluded from this figure

As is evident in the above figure, SADTU members are significantly more likely to support legal strikes than any of the other union members, with 88% of SADTU respondents indicating their support. Only 6% of SADTU-affiliated respondents strongly disagree with engaging in strikes for this purpose, while a relatively strong show of disapproval of strikes (21%) relative to the number of sampled respondents was demonstrated from SAOU-affiliated respondents. Unaffiliated respondents who did respond to this question, demonstrated surprisingly little opinion on the matter, with 40% remaining neutral.

Of possibly greater significance, however, is the absolute rejection by all respondents, across the different unions, of unprotected strikes. Item B14 asked respondents to indicate their level of agreement or disagreement with the statement that they support the use of unprotected strikes to see that union demands are met. Rejection of the use of unprotected strikes is emphatic across all units of analysis, as is evident in Table 10 below.

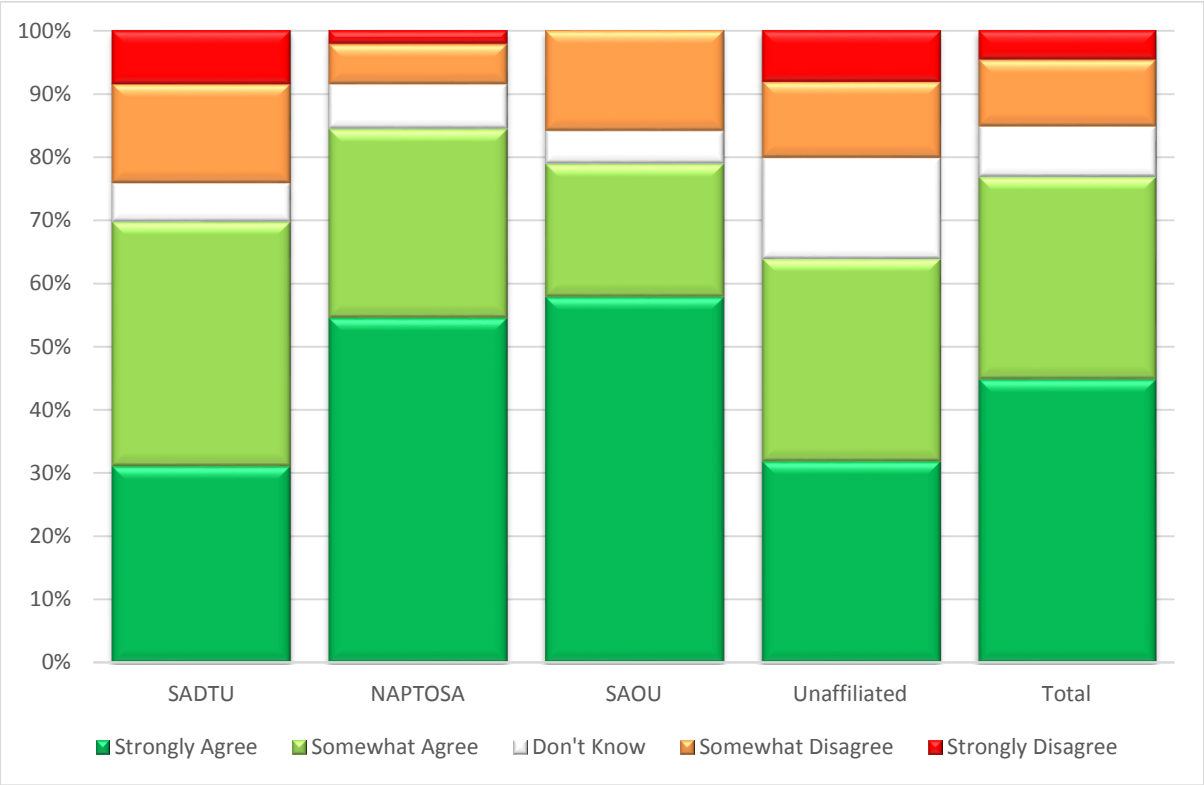
Table 12: Frequency distribution of support for use of unprotected strikes

Support for unprotected strikes	Strongly Agree (%)	Somewhat Agree (%)	Don't Know (%)	Somewhat Disagree (%)	Strongly Disagree (%)	Mode	St. Dev.
SADTU	8	17	6	26	43	Strongly Disagree	14.64
NAPTOSA	4	4	8	6	79	Strongly Disagree	46.79
SAOU	0	5	11	0	84	Strongly Disagree	6.87
Unaffiliated	0	20	30	10	40	Strongly Disagree	3.16
Total	**4**	**12**	**9**	**12**	**63**	**Strongly Disagree**	**69.41**

* Unions with fewer than 5 survey returns are excluded from this table but included in the total figures

The final item related to strike action in the study (Item C27) asked respondents to agree or disagree with the statement that the professional image of teachers is damaged by unprotected strikes. Responses to this item indicate a measure of internal reliability of responses, in that the results of this item correlate closely with Item B14, discussed above. The modal responses for all units of analysis were either 'strongly agree' or 'somewhat agree', with just 16% of all respondents disagreeing strongly or to some degree with the statement. 77% of all responses indicated either strong or some agreement with the statement, as outlined in Figure 11 below.

Figure 14: Perceived damage to professional image of teachers by unprotected strikes



* Unions with fewer than 5 survey returns are excluded from this figure

This result indicates a clear message from respondents that unprotected strikes are no longer the *du jour* mechanism for resolving bargaining issues. This will be discussed in more detail in Chapter 4 and compared with current literature in Chapter 5.

4.3.6 Summary of attitudes and perceptions that teachers exhibit regarding South African teacher unionism in general

It is clear from the mostly unequivocal responses to the items outlined in Section 4.3 that most respondents demonstrate relatively similar attitudes and perceptions to common themes, regardless of union-affiliation, with a notable few exceptions that will be discussed in Section 4.4.

With regards to union fees and perceived value for money, the majority of respondents demonstrated high levels of satisfaction with the current status quo (with 74% and 64% support for union fees and value for money respectively). Similarly, almost all respondents perceive their unions as a valuable resource of benefits, such as protection from unfair treatment, legal advice, and salary negotiations.

Certain areas of perceived benefits as described in recent media and other qualitative literature, such as union involvement in promotions, appear unclear to some respondents, and findings reflect a largely disparate or neutral set of responses.

A significant proportion of respondents indicated that they do not support the idea of forced union membership, regardless of which union they belonged to. SADTU-affiliated respondents, interestingly, exhibited the highest resistance (71%) to forced union membership despite exhibiting a very high degree (80%) of pride in their union (see Section 4.5).

With regards to the final theme examined under general perceptions of teacher unionism in South Africa, almost all respondents indicated clear support for the statements indicating union involvement in teacher development, quality in education for learners, and in the provision of useful workshop or learning opportunities. Whether these responses are supported by current literature and focus areas of particular unions however, remains for discussion under Chapter 5.

Perhaps the most important finding for this study was the complete rejection by respondents of all unions of participation in unprotected strikes, with 76% of all respondents rejecting the practice. While some support was evident for protected strikes (64% total agreement), especially from SADTU-affiliated respondents (of whom 88% agreed with the practice), there was also clear expression of support (77%) for the damage that is done to teachers' professional reputations through unprotected teacher strikes. The findings related to strike action will, however, be discussed in further detail in Chapter 5.

4.4. Particular aspects of teacher unionism that teachers of different unions support and/or reject

It is important to note that across union-affiliation responses, only two significant areas of disagreement with regard to union-practice were detected, namely unprotected strike action and performance evaluation. This section aims to address the main findings of the second research question of this study, which attempted to identify main areas of agreement or disagreement of members with current union practice.

Since two of the research themes, namely union benefits and strike actions have been previously covered in Section4.3, the findings from these themes have been tabulated and presented as summaries for the response to this research question. The research theme related to performance evaluation and unprotected strikes are, however, dealt with in more detail in this, and later sections.

4.4.1. Levels of agreement with current union fees and benefits

As was noted in Section 4.3, most respondents, with the exception of the unaffiliated respondents, demonstrated similar perceptions and attitudes towards the various union benefits outlined. Table 13 below summarises the combined findings of the items related to union benefits and fees.

Table 13: Summary of findings regarding perceptions of union benefits and fees by union

Item no.	Abbreviated topic	Union	Total % support (includes 'strongly agree' and 'somewhat agree')	Total % support per item* (all respondents)
B09	Protection from unfair treatment in the workplace	SADTU	69	58
		NAPTOSA	55	
		SAOU	84	
B20	Provision of legal advice or representation for disciplinary actions	SADTU	79	68
		NAPTOSA	66	
		SAOU	74	
B22	Would not be given salary increases without union	SADTU	66	59
		NAPTOSA	60	
		SAOUT	55	

* Unions with fewer than 5 survey returns, and unaffiliated members are excluded from this table but are included in the total column

Item B21, which asked respondents to agree or disagree with the statement that their unions assist members with obtaining promotions, yielded the highest degree (47%) of uncertain responses of all items in the questionnaire. SADTU-affiliated respondents were equally split between agreement and disagreement with this item, NAPTOSA-affiliated respondents were slightly skewed to the disagree side, and SAOU-affiliated members were overwhelmingly (63%) on the fence for this question. Interestingly, while 31% of SAOU members agreed strongly or to some degree with this statement, no respondents from this union disagreed with it, either strongly or to some degree.

4.4.2. Areas of disagreement with union practice

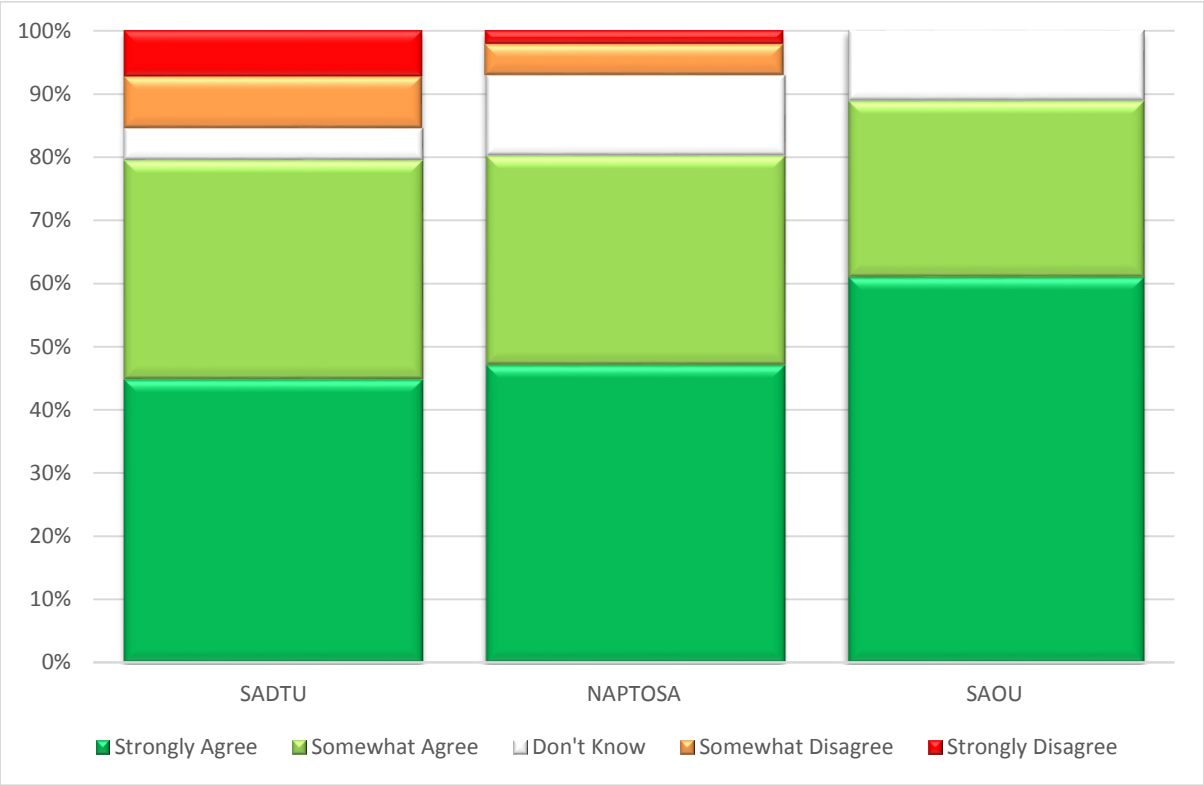
As indicated in Section 4.4 there are two main areas in which respondents indicated disagreement with current union practice. These relate to the resistance of some teacher unions to allow performance evaluation, and in the use of unprotected strikes. In both of these areas, respondents indicate a strong difference in attitude to current practice. Section 4.4.2.1 outlines the findings with regards to performance evaluation, and Section 4.4.2.2 summarises the findings already presented in Section 4.3.5 relating to unprotected strikes.

4.4.2.1. Union resistance to performance evaluation

While performance evaluation in the teaching environment of South Africa is a long and contentious issue (see Mosoge & Pilane, 2014) item B19 of this study asked respondents to agree or disagree with the statement that they would welcome efforts by their union to set standards for evaluating teachers. The responses provided by respondents suggest that union members themselves have little resistance to union-standard performance evaluations.

In fact, 77% of respondents from the four units of analysis show support for the idea, and if the large and potentially distorting figures of the unaffiliated respondents are removed from the result, the total support rises to 83% for the statement. Significantly, over 80% of SADTU members, who are traditionally depicted as being strongly opposed to any form of performance evaluation in the fear that it will be used to scale salaries (Mosoge & Pilane, 2014) also agreed with this statement, as demonstrated in Figure 15 below.

Figure 15: Degree to which respondents would welcome union involvement in setting standards for evaluating teacher performance.



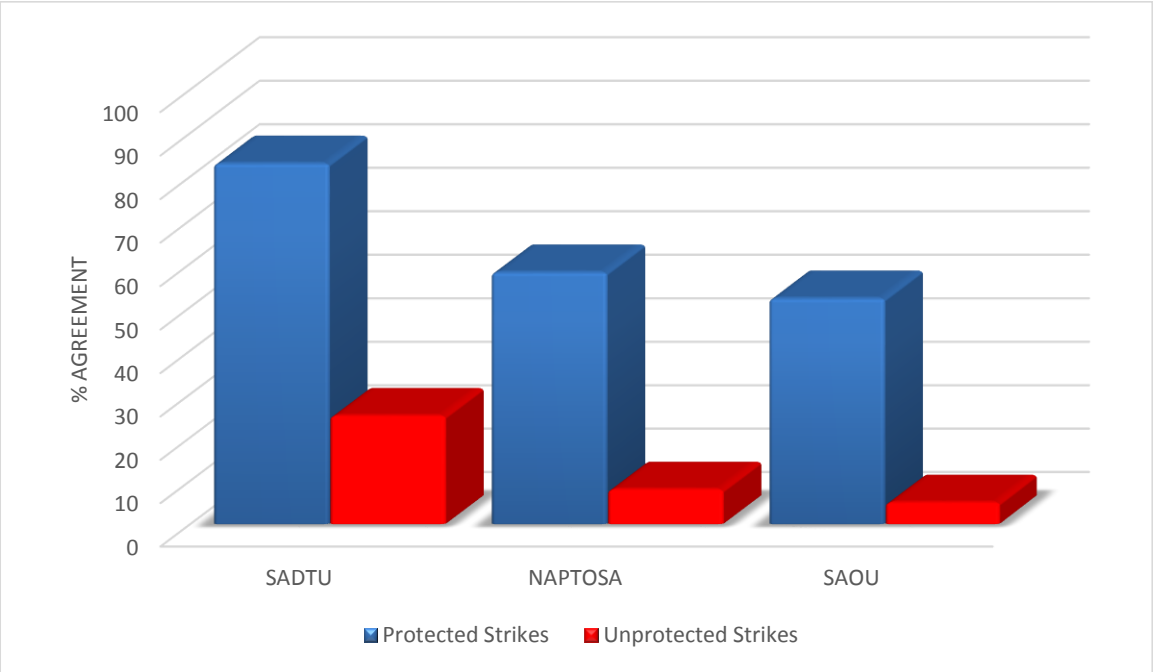
* Unions with fewer than 5 survey returns, and unaffiliated members are excluded from this figure

4.4.2.2. Unprotected strike action

Although 65% of all respondents supported the use of protected strikes to achieve union goals (see Section 4.3.5), a significant majority (76%) disagree, however with the use of unprotected strikes to achieve union goals.

Item B14, also described in Section 4.3.5 depicts clear disenchantment with the use of unprotected strikes as a bargaining method. Figure 16 below provides a comparison of attitudes towards protected and unprotected strikes by members of the three main unions sampled.

Figure 16: Comparison of support for protected vs. unprotected strike action to achieve union goals



This finding is possibly the most significant of the study, and will be elaborated on in Chapter 5.

4.5. Support or contradiction of current qualitative literature on South African teacher unions

Although the research question relating to the 'fit' of responses with current qualitative literature will be examined in detail in Chapter 5, this section will present the main data findings of the items included in the research instrument relevant to thematic overlap with current qualitative literature.

Three of the themes and their associated survey items included under this research question have previously been covered in section 4.3, 4.4, or both. Where this is the case, a summary of their importance for the abovementioned research question is made. More elaborate discussion of these themes and their associated items will, however, be presented in Chapter 5. Findings on respondents' experience of union membership as a theme has not, however, been previously presented, and is done so in this section.

4.5.1. Attitudes and perceptions to the experience of union membership

Although demographic profile Items A01 through A06 are included for discussion under this theme and research question, these items were described under Section 4.2 and will be discussed in depth in Chapter 5. There are, however, five items within the theme of union membership that have not yet been presented, and which form the basis of this section.

One of the important areas relating to unions uncovered during the literature review related to the manner in which unions communicate with their members. This is one of the more prominent issues raised in Item OQ30 of the survey, and Items B10 and B11 investigated perceptions to this element in the matrix statements.

Item B10, which asked respondents to agree or disagree with the statement that they were happy with the way that their union communicates with them, indicates a high degree of satisfaction with unions, with 40% of the three main sampled unions' respondents agreeing strongly, and 35% agreeing to some degree with the statement that they are happy with the way that their union communicates with them. Only 16% of respondents from the three main unions represented in the sample disagreed with this statement.

Table 14: Frequency distribution of satisfaction with method of union communication

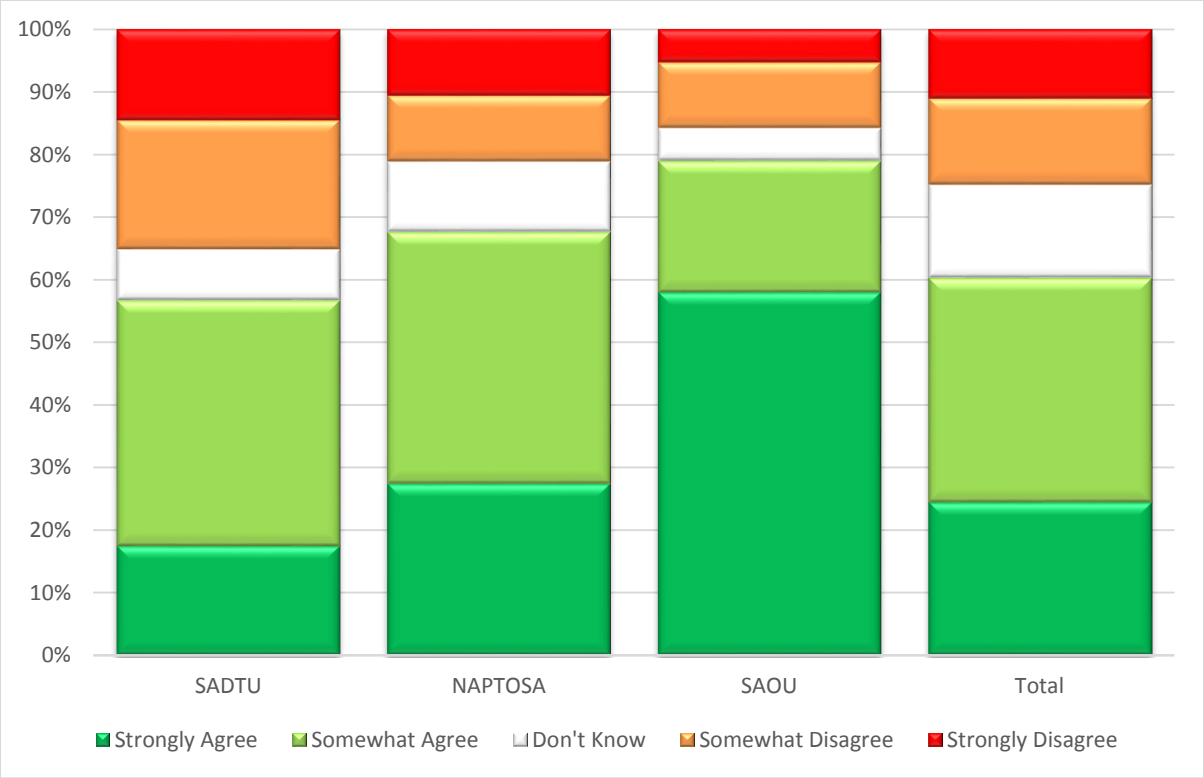
Satisfaction with communication	Strongly or somewhat agree (%)	Don't Know (%)	Strongly or somewhat Disagree (%)	Mode	Sample SD (S)
Total	**75%**	**9%**	**16%**	**Strongly Agree**	**35.96**

* Unions with fewer than 5 survey returns, and unaffiliated members are excluded from this table's figures

The largest distance from the mean within individual units of analysis (SD = 27.05) in this item was, once again, from the NAPTOSA-affiliated respondents, with SAOU-affiliated members displaying the lowest variability (SD = 5.22), and thus more uniform attitudes. SADTU-affiliated members similarly reflect a reasonably low variance (SD = 7.67) from the mean.

As with Item B10, the results of Item B11, which asked respondents to agree or disagree with the statement that their unions involve them when they need to make decisions about education that affect teachers, also further points to a picture of overall satisfaction with teacher unions' communication. Figure 17 below demonstrates the summary of attitudes by union.

Figure 17: Perceptions of union consultation with members regarding educational issues

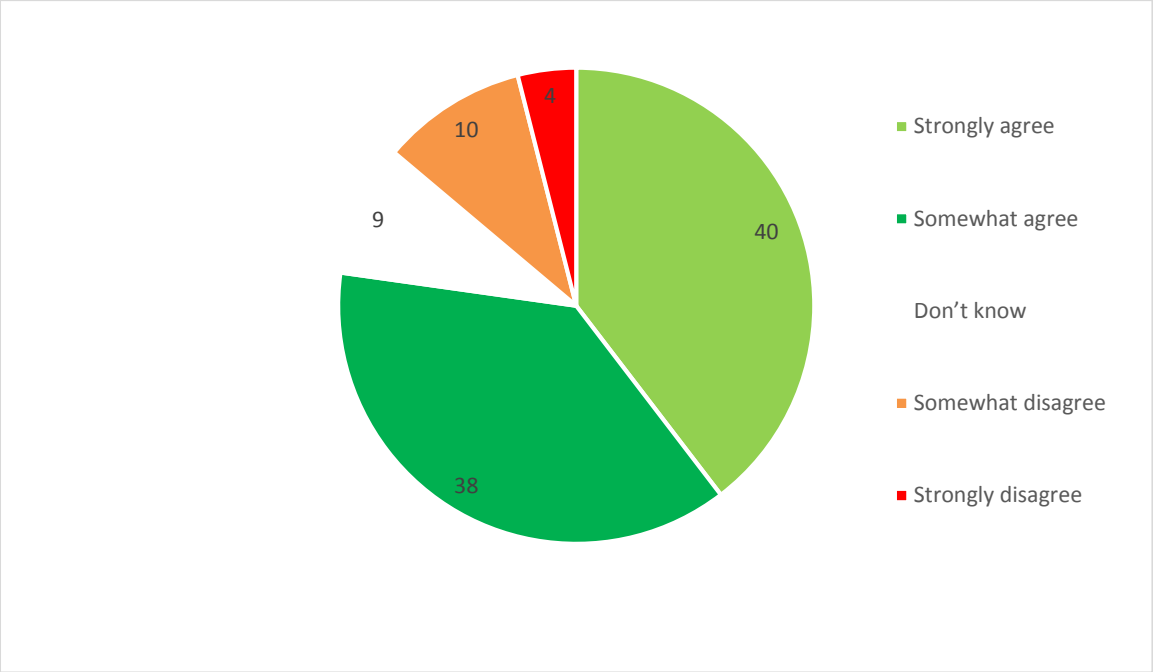


* Unions with fewer than 5 survey returns, and unaffiliated members are excluded from this figure

Of the three represented unions, a total of 69% agree strongly, or to some degree, that their unions do indeed consult with them, while 27% of respondents in these three unions disagree. SAOU-affiliated respondents were the most satisfied (79%) with their union's consultation with them, followed by NAPTOSA-affiliated members (67%), and SADTU-affiliated members (57%). Once again, NAPTOSA-affiliated respondents demonstrated the widest variance in responses (SD = 18.99).

Item B12 asked respondents to agree or disagree with the statement that their unions negotiate pay and benefits in ways that they agree with. Figure 18 below provides a percentage overview of the findings.

Figure 18: Agreement with union methods of pay and benefit negotiations



* Unions with fewer than 5 survey returns, and unaffiliated members are excluded from this figure

A majority of respondents (78%) again agree with this statement, either strongly or to some degree, although the levels of confidence of this agreement differs by union. NAPTOSA-affiliated members demonstrated the highest degree of confidence in this statement, with 'strong agreement' as its mean category and 58% of its respondents selecting this option. NAPTOSA- and SADTU-affiliated respondents however, demonstrate their mean as 'somewhat agree' for this Item, and were similarly measured in terms of strong agreement, with 32% and 30% respectively. Figure 18 below provides a summary of the findings for this item.

Item B23 asked respondents to agree or disagree with the statement that they were proud to be a member of their union. A significant number (82%) of respondents from the three represented unions agreed with the statement, either strongly (47%) or to some degree (35%). Table 15 below provides further description of these findings.

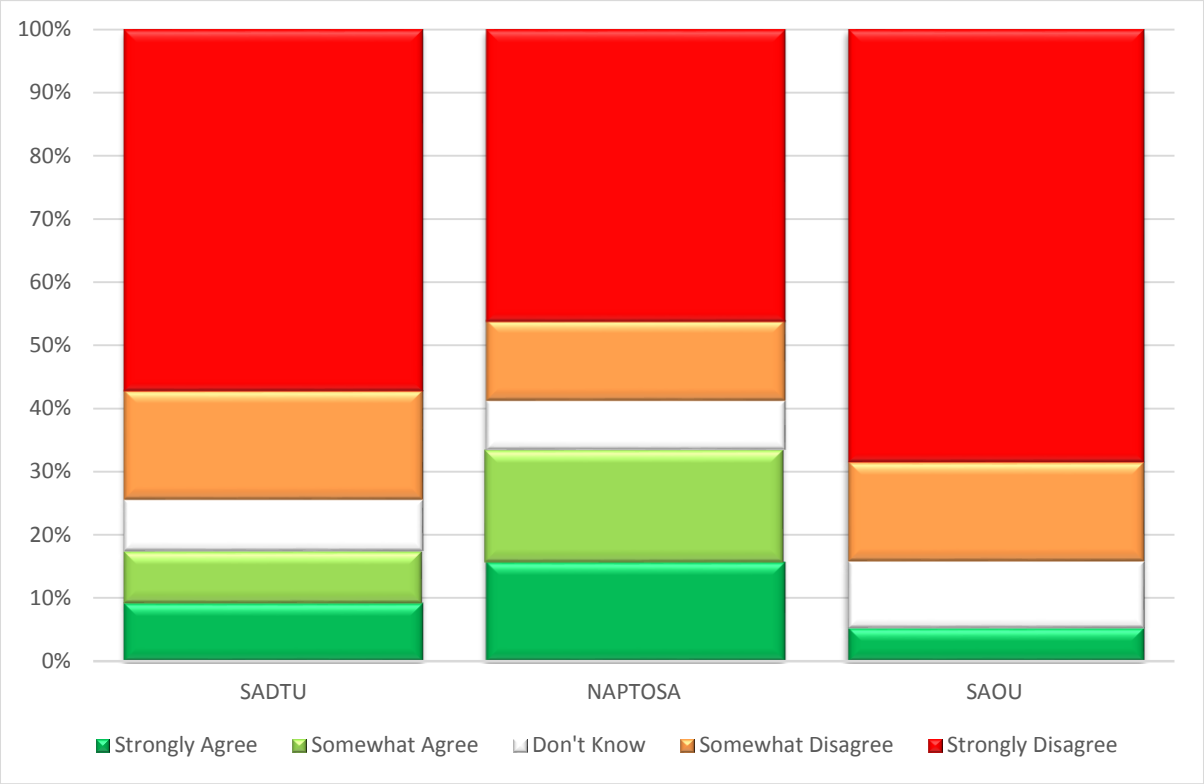
Table 15: Frequency distribution of reported pride in union membership

Pride in union	Strongly Agree (%)	Somewhat Agree (%)	Don't Know (%)	Somewhat Disagree (%)	Strongly Disagree (%)	Mode	Sample SD
SADTU	45	35	13	6	0	Strongly Agree	18.81
NAPTOSA	50	32	11	6	1	Strongly Agree	28.54
SAOU	47	37	0	16	0	Strongly Agree	4.09
Total Average	47	35	8	9	1	Strongly Agree	51.06

* Unions with fewer than 5 survey returns, and unaffiliated members are excluded from this table

For Item B24, which is the final data set under the union membership theme, respondents were asked to agree or disagree with the statement that they would prefer not to belong to any union at all. As indicated in Section 3.5 under the discussion of the instrument, negatively phrased statements are not ideal for use in questionnaires as they may lead to confusion. Given the difficulty in framing this statement positively and the likelihood of this leading to knee-jerk responses as opposed to more considered responses, the negative statement was nevertheless employed. Figure 19 below outlines the responses from respondents of the three represented unions.

Figure 19: Attitudes towards eschewment of personal union membership



* Unions with fewer than 5 survey returns, and unaffiliated members are excluded from this figure

It is clear from Figure 19 that the majority of union-affiliated respondents demonstrate a strong preference for remaining tied to a teacher union, despite any (qualitatively) reported issues that suggest that they might not. SAOU-affiliated respondents appear most appreciative of the benefits that their teacher union affords them, with 84% against the idea of not belonging to any union, and just 19% of affiliated respondents for it. SADTU-affiliated members also demonstrate strong inclinations to remain unionised (74%), while NAPTOSA-affiliated respondents showed the least, but not inconsequential, inclination (59%) to remain unionised.

4.5.2. Attitudes and perceptions to union benefits, strike action, and teaching and learning

Overall, the positive attitudes and perceptions of teacher unionism exhibited by respondents in this study appears to disagree to some extent with available qualitative literature in South Africa, which frames a somewhat more negative view of teacher unions. Apart from the previously mentioned union membership theme, areas of interest from this study that will be analysed in the context of the current South African literature relate to union benefits, strike action and teaching and learning.

Items relating to these themes were previously described in Section 4.3 and 4.4. and so are merely summarised in this section under Table 16 below.

Table 16: Summary of item findings for comparison with qualitative South African literature on teacher unions

Theme	Item no.	Abbreviated Item Statement	Total % support (strongly & somewhat agree)
Union membership*	B11	Consultation on educational issues	69
	B12	Negotiation of salary in agreeable ways	78
	B23	Pride in being a member of union	82
	B24	Preference to not be unionised	19
	C29	No forcing of union membership	66
Union benefits	B09	Protection from unfair treatment	58
	B20	Assistance with legal advice	68
	B21	Assistance with promotions	27
	B22	No union; no salary increase	60
	C26	No union; unfair treatment by employer	74
	C28	Unfair promotions by unions	52
Strike action	B13	Support for protected strikes	64
	B14	Support for unprotected strikes	16
	C27	Unprotected strikes damage reputations	77
Performance evaluation	B19	Support union efforts to introduce performance evaluations	77
Teaching and learning	B15	Helps to develop education policy	66
	B16	Works to improve education quality	66
	B18	Provision of useful training workshops	71

* Excludes demographic profile findings which will also be presented but are dealt with separately.

4.6. Summary of findings

The data collected for this study yielded some surprising findings, the first of which was that the union membership slanted more towards NAPTOSA than SADTU, as was expected and sampled for. An additional, although not necessarily unexpected finding, was the small percentage of respondents in the 22 to 29 category, which poses potential challenges for the future of education in Gauteng.

Two other areas of interest were gleaned from the processed data, the first of which is that overall, despite teachers not being 'heard' in formal quantitative studies on unionism and union practices, they are ultimately quite satisfied with the current *status quo* in union membership. Sampled union-affiliated members demonstrated clear support and acceptance of union fees, benefits, methods used to engage with the employer, teacher development practices, and also showed support for unions in principle as protection against an apparently hostile employer.

Perhaps the most important feature of the analysed responses however, are two stark areas of disagreement with regards to (some) current union practice. The first of these relates to the use of unprotected strikes, a practice that a significant majority of respondents perceive as having a deleterious effect on the professional reputation of teachers, and so overwhelmingly, regardless of union-affiliation, reject. The historical rejection of teacher performance evaluation standards by unions such as SADTU is another area of disagreement between members and unions based on the findings of this study, with a large majority of respondents indicating clear support for the introduction of performance evaluation standards.

These findings are discussed in greater detail in Chapter 5, where they are examined in relation to existing literature, and the three research questions this study undertook to answer.

Chapter 5: Discussion, Conclusions, Limitations & Recommendations

5.1 Introduction

Based on the general trends in attitudes and perceptions of respondents in this study, it is clear that for the most part, teachers are happy with the current *status quo* of teacher unionism in central Gauteng, as well as with the nature of services and benefits provided by their unions.

Where they differ with current unionism and union practice, at least in terms of media reporting, is with regards to the use of unprotected strikes, and in the resistance of (some) unions towards performance evaluation standards.

A number of areas in this study yielded quite contrary data to that detailed in qualitative literature, including strike action, performance evaluation, union satisfaction, performance review, and 'teaching and learning'. In these cases, it is interesting that qualitative comments from the final, open question item of the research instrument, frequently agree with the related qualitative literature, but that when taken in the context of the quantitative responses, no longer carry much weight. As such, the areas of disagreement may present implications for both existing and future research of teacher unions in South Africa.

This chapter will present the discussion and conclusions of the study in relation to the research questions established in Section 1.5, and will also detail the specific limitations and recommendations of the study.

5.2 Discussion of findings

This section presents the major findings of the study through the use of the themes identified in Table 16, Section 4.5.2. Many of the items within these themes are associated with more than one research question and so are discussed once, but mentioned where necessary.

5.2.1 Discussion of findings related to the demographic of union membership

Struwig and Stead (2009) caution that for stratified purposive samples to accurately reflect their proportions and properties, accurate information on the proportions of each stratum is necessary. This was an area of considerable interest and initial concern subsequent to data capture in this study, since the returned survey demographics did not, in fact, reflect the expected union membership weightings as indicated on SADTU's (2013) website.

SADTU, as the majority teacher union, claims a 70% representation of the total teacher population in South Africa (SADTU, 2013) while figures from NAPTOSA (2013) indicate its membership at approximately 23%. For this study, just 34% of the sample indicated that they were members of SADTU, while 49% identified themselves as NAPTOSA members.

Considering these stated figures and the purposive, stratified sampling (70% of the sample) of lower quintile schools in the first phase of sampling in which SADTU reportedly dominates (see Msila, 2013; Fleisch, 2013; and Heystek & Lethoko, 2001), the results relating to union-affiliation for this study were surprising, and efforts were made to determine the reasons for the apparently anomalous sample strata.

Initial review of the data suggested that the sampling method had either incorrectly identified the different quintile divisions: that is Quintiles 1 – 4 schools, and Quintile 5 schools; that a disproportionate number of NAPTOSA-affiliated teachers had volunteered to complete the survey; that a disproportionate number of SADTU-affiliated teachers had declined to complete the survey; or finally, that the DBE's (2013) Master List quintile descriptors were inaccurate and that the incorrect schools had, in fact, been sampled as a result.

The DBE Master List (2013) was re-checked in order to make this determination, and the researcher confirmed that the correct quintiles had, in fact, been sampled. With this confirmed, a cross-validation of the sampled schools with an earlier DBE Master list from 2011 (DBE, 2012), and the latest version of this list from 2014 (DBE,2014a) was also made. This comparison returned an interesting trend, in that the quintile status of schools does not appear to be as static as one may suppose. Of the 16 sampled schools, five had officially changed in quintile status between 2011 and 2014, with three being raised by one quintile and two being downscaled. This could potentially have had an impact on the sampling of the schools.

Since samples were conducted using Quintiles 1 – 4 and Quintile 5 schools however, and all adjustments indicated on the DBE's Master Lists (DBE, 2011; DBE, 2013; DBE, 2014a) occurred within the Quintile 1 – 4 range, this was not deemed a likely cause of the apparently anomalous sample returns.

A potential contributor to anomaly in the sample was, however, detected in one of the sampled schools, with the principal of the school claiming his school had been downgraded from Quintile 5 to Quintile 4 by his request in 2012. The Master List (DBE, 2014a) however, maintained this school at Quintile level 5 however, and evidence of this request or downgrade was not provided. As such, the DBE's (2013) figures, which were originally used to determine the sample, were maintained as the most credible source of information on quintile.

Despite these possibilities being largely rejected, it is possible that a school currently operating at a lower quintile level than was the case a year or two years prior, might still employ educators who would typically have fallen into the Quintile 5 category. Since higher quintile teachers are more likely to belong to NAPTOSA than SADTU (see Heystek and Lethoko, 2001; Msila, 2013; Fleisch, 2013) this could offer a possible clue to the apparently distorted proportions.

Under the abovementioned premise, the effect of distortion would have been felt despite efforts to deliberately target lower quintile schools in order to reach a representative proportion of SADTU affiliated members. It is impossible, however, to extrapolate this highly speculative possibility to all schools, since there is little evidence that it applied to any school in particular, and certainly not to the majority of the Quintile 1 – 4 sample. That said, quintile movement should be considered in the design of any related future studies' sampling methods.

A different line of enquiry to shed light on this anomaly included requests (telephonic and email) to the Gauteng structures of SADTU for information on its membership numbers. Neither of these attempted communications yielded any information or response however, and a substitute, but credible source of information on union membership, namely the Education Labour Relations Council (ELRC), was used to make this determination.

As a collective bargaining council, the ELRC requires precise membership data in order to assign proportionate representation to its collective bargaining units. As such, with its voting weights based on PERSAL figures (ELRC, 2013) and not on union claims, the different union membership weightings indicated in the ELRC (2013) document are accepted as a more reliable indicator than union websites (SADTU, 2013; NAPTOSA, 2013), from which the sampling data had been taken.

The official figures provided (ELRC, 2013) reveal that Gauteng and the Western Cape have, in fact, significantly lower SADTU memberships when compared with the rest of the country. Gauteng's SADTU weighting, according to the ELRC (2013) data, includes 29 296 members, which represents just a 56% membership, and not 70% membership as claimed by SADTU's website. In fact, the total weighting afforded to SADTU *nationally* is 66.09%, or 244 669 members (ELRC, 2013), and not 'over 260 000 teachers' (see Nicolson, 2014; SADTU, 2014b) as frequently claimed. As such, the initially large 'gap' in respondent heft for SADTU in this study, while not completely accounted for by these figures, does diminish somewhat.

The ELRC (2013) figures for Gauteng also have the effect of raising the expected figures for non-SADTU unions to 43.64%. As such, the apparently large anomaly in extra response from NAPTOSA and SAOU-affiliated members is also somewhat reduced, and the sample no longer appears as uncharacteristic of the demographics.

In addition to the reweighting to 56% for SADTU based on the ELRC (2013) figures, other studies were consulted and compared for union-membership weightings. Although quantitative studies relating specifically the experience of teacher union membership are limited, if not absent altogether in the South African context, the few studies in related areas that are based in Gauteng (see Mestry *et al*, 2009) also display much smaller SADTU response figures. In fact, in the Mestry *et al* (2009) study, just 27% of their 414 sampled educators from 50 Gauteng schools identified themselves as SADTU members. This figure is pointedly lower than the findings in this study, in which 34% identified themselves as SATDU members.

Notwithstanding the various reasons for the anomalous union-affiliation spread in this sample, the sample size of 98 samples received from respondents identifying themselves as SADTU-members should, according to a separate sample size calculation (Raosoft, 2004) provide a more than adequate representation of SADTU-affiliated central Gauteng teachers for the purposes of this study. Given the relative uniformity of responses within individual units of analysis of this study, the margin of tolerable error was increased to 10% from 5%. With confidence level static at 91%, a response distribution set to 50%, and SADTU's Gauteng population inserted as 29296 (ELRC, 2013), Raosoft (2004) returned a recommended sample size of $n_1 = 72$, which was exceeded by 26 responses. The $n_1 = 98$ sample is thus considered adequate for this unit of analysis.

5.2.2 Discussion of findings related to the general demographic profile of respondents

This study identified five main demographic characteristics as important for the purposes of this study, including gender, age, experience, qualification, and position level at school. A racial profile was not deemed a necessary element of the profile for the purposes of this study, which was separated into units of analysis based on union-affiliation. Discussions related to the data analysis presented in Chapter 4 are included in this section.

Gender

The DBE (2012) indicates that of the 70 340 teachers in Gauteng, 50 462 are female. This translates to an official 72:28 female to male ratio in the teaching profession and a distorted Standard Deviation (SD) of 108.19 for Item A01. The sample ratio obtained for this study was 77:23, and as such, was weighted in favour of females in comparison with official figures (DBE, 2012).

The 77:23 split of this sample is, however, mirrored by other Gauteng-based teacher studies, such as that conducted by Mestry, Hendricks & Bisschoff (2009), whose 400+ sized sample reflected a 75:25 female to male ratio, and is thus close to the findings of this study.

Carnoy and Chisholm (2008), citing DOE (2005) figures in their reporting, indicate a 67 to 75% incidence of female teachers at the primary school level, depending on the province, with Gauteng recording the highest percentage of female teachers. The results of the sample of this study are also reflected by official World Bank South Africa Indicators, measured in 2009 (Trading Economics, 2014), which present a primary school female to male teacher ratio for South Africa of 77:23.

Some important considerations are necessary when analysing the gender heft of this sample. Firstly, it should be noted that the DBE (2012) does not provide separate figures for educators from public and independent schools in its report, and it would be unwise to assume that the gender ratio is *necessarily* the same across both school types. Since the purpose of this study is to identify the attitudes of *unionised* educators to three research questions and so excludes educators from independent schools, this potential discrepancy must be borne in mind.

Similarly, in evaluating the sample proportion, it is also worth considering that the second, volunteer-phase of sampling may have resulted in more females than males completing the survey. Smith (2008, citing Moore & Tarnai, 2002; Curtin *et al*, 2000; and Singer *et al*, 2000), for example, argues that trends in survey-response studies demonstrate that women are more likely to participate than men.

This claim is supported by Kumar (2014), and as such, the apparent 5% elevation in female response-rate in comparison with the official DBE (2012) figures should not represent any major impediment to generalisation of the findings to the central Gauteng teaching population.

It is interesting to note that although SADTU female: male membership ratio still represents a higher female membership (66%) than male membership (34%), these figures represent an 11% increase in male membership against the total sample population, and a distortion from the DBE (2012) gender ratio figures of 6% on the male demographic. Although attempts were made to confirm the gender make-up of SADTU's Gauteng membership via both telephonic and email queries, the researcher was unsuccessful in obtaining any clarity on gender from SADTU's Gauteng branch.

COSATU's Workers' Survey (COSATU, 2012), however, which surveyed over 3000 respondents from its various member unions indicates a national male to female gender split for SADTU of 28:72. This is in line with the overall gender findings of this study, but not in line with the results from the SADTU-affiliated respondents in this study (34:66). As such, it is difficult to determine whether the higher male population from SADTU in this study is due to higher male membership in SADTU's Gauteng region, from faulty sampling, because male SADTU members are more likely to raise their voices than female members (Shermain, 2008), or from another reason.

In this regard, it is perhaps pertinent that although SADTU's constitution (2010) explicitly rejects discrimination in any form, reported incidents, such as the parading of women's (in this case, Basic Education Minister Motshekga's) underwear at a march in April 2013, and claims against SADTU male members (Shermain, 2008), do perhaps suggest that a '…patriarchal prejudice in an environment that is already volatile for women' (Motshekga, 2013, cited in Sapa, 2013) remains in SADTU.

Possible gender disparities are also reflected in official union data on SADTU. In an item on gender representation in SADTU in the COSATU (2012) survey for example, approximately 78% of respondents thought that there were too few women in leadership in the SADTU structures, with the primary reason attributed was that 'women are not confident' (COSATU, 2012:32). Although not differentiated by union, the summary on the finding reported that, '[o]verall, members were most likely to say that women did not have the capabilities or confidence needed for leadership roles' (COSATU, 2012:31), indicating a level of gender bias within the membership cohort.

As such, although these are admittedly circumstantial pieces of evidence that may require deeper investigation, they are, perhaps, indications that a higher incidence of male 'voice' is present in SADTU in comparison with NAPTOSA and SAOU.

The overall male to female finding of 77:23 for this study remains, however, in line with others, and so does not represent any major deviation from the assumed demographic of Gauteng teachers.

Age

Although direct measurement is not possible across official figures from the DHET/DBE (2011) due to different age category bands being used, the findings related to age in this sample are not inconsistent with official data. The DHET/DBE (2011) figures for 2009, for example, indicate that over 42% of South African teachers are over the age of 45.

Fifty-seven percent of this study's sample identified themselves as over the age of 40, which is higher than the (DHET/DBE, 2011) figure, but which includes measurement of an extra five years in comparison with the DHET/DBE (2011) figures. The 57% finding for the above-40 category in this study does, however, agree with a recent HSRC study that Arends (2011) refers to, which established that 60% of all South African teachers are over the age of 40.

COSATU's (2012) figures on SADTU's age split indicate that just 5% of its members are under the age of 29, with 95% of its members between the ages of 30 to 65, and an average age of 44. These figures conform closely with the findings for SADTU in this study, where the modal age category selected by SADTU-affiliated respondents was 40 to 49, and where just 4% selected the under-29 category.

The age profile of this study supports research conducted by Fleisch (2014), which indicates a low distribution (between 9 and 20%) of Gauteng educators in the age 22 – 29 cohort, and the most significant share (between 35 – 40%) of educators in the 40 – 49 cohort. Fleisch's finding that between 20 and 28% of Gauteng teachers fall within the age 50 – 59 cohort is also evident in this sample (22%). In total, Fleisch's findings for the above-40 category reflect agreement with both the abovementioned HSRC study (see Arends, 2011), and with this study's age demographics, with between 57 to 62% of his study's figures falling into this category.

The age result of 12% for the under-30 category in this study is not wholly consistent with DBE/DHET (2011) reported figures for 2009, which indicate that officially, fewer than 5% of teachers in South Africa fall into this category.

Smith's (2011) assertion that younger people are more likely to complete surveys than older people may, however, partially or wholly account for the elevated figure in this particular sample.

The age demographic of the sample is thus deemed sufficiently reflective of the Gauteng teacher age demographic.

Experience

Data from the DBE/DHET (2011) technical report is in general agreement with the experience profile findings of this sample. According to the DBE/DHET (2011), 83% of teachers in South Africa have more than five years' experience in education, with 15% having in excess of 15 years' experience. This study's findings are similar, with 87% of the sample indicating 4 or more years' of teaching experience in total.

Rather worryingly however, the technical report (Ibid) indicates that the category of teachers with fewer than five years' experience has dropped from 36% in 1994, to 16% in 2009 (DOE, 2009f, in DBE/DHET, 2011). This study supports this trend, with just 12% of its sample indicating fewer than four years' of teaching experience.

As such, the implications of the profile suggest that while significant skill and experience are currently present in the GDE educator cohort in general, the trend towards diminishing entries into the teaching profession may forecast an area of future concern for the GDE in terms of teacher replacement. Basic Education Minister Angie Motshekga summarised this, rather inelegantly, recently when she summarised this problem as '… a very uncomfortable bulge of older teachers' (in Ndenze, 2014) at a recent briefing. The Minister warned that the current 'bulge' of teachers between the ages of 45 to 55, will become a considerable challenge over the next ten years and beyond due to retirement, and indicated that the DBE is currently profiling current teachers, and has initiated a programme to recruit and train new teachers.

A part of this apparent 'bulge' and absence of younger cohort in the national teacher demographic problem may be the low proportions of African students under the age of 25 studying education (Arends, 2011). Paterson and Arends (2008, in Arends, 2011) argue that socioeconomic difficulties and delayed completion of grade 12 qualifications in this demographic, particularly female Africans, result in this group entering education studies as older students, and subsequently entering the teaching profession at later points of their lives.

Arends (2011) indicates that two associated problems are relevant to the absence of teachers in the younger cohorts: firstly, a high attrition rate of South African teachers at the 25 to 34 year old category exists; secondly, there is also reduced selection of teaching as a profession. Arends (2011) cites a number of studies to establish reasons for these trends. Cosser's findings (2009, in Arends, 2011) for example, suggest that more students enter education programmes than those who plan on studying education – perhaps suggesting that education is a 'backup' plan for indecisive school leavers, or, as Chisholm (2009, in Arends, 2011) points out, that underperformance in grade 12 results may exclude students from more 'desirable' professions, but still allow for access to education studies.

An additional finding by Cosser and Sehlola (2009, in Arends, 2011) is that school leavers believe that teaching as a profession has less status than professions like accounting and engineering, and so are reluctant to become teachers. Peltzer et al (2005, in Arends, 2011) posit that a wider range of options exist for current female school leavers than was the case in previous decades, and that this results in teaching having to compete with a greater number of professions than in the past, to attract school leavers. Based on the findings by Cosser and Sehlola (2009, in Arends, 2011), it is unlikely whether the newly competitive environment in which education finds itself will feature favourably to school leavers.

Hoggan (2011) adds to the possible reasons for low uptake of school leavers to enter the teaching profession in his article on remuneration expectations of 'Generation Y': those individuals born approximately between the 1980s and 2000s. Hoggan (2011) proposes that the high expectations of financial reward that this generation has, and its value of compensation in comparison with previous generations, is a contributing cause for the failing teacher enrolment numbers. He argues (Ibid) that expectations of high salaries by the age of 30 (Martin and Tulgan, 2011, in Hoggan, 2011) result in school-leavers electing to seek job opportunities in the private sector, and that in order to attract school-leavers, remuneration of teachers should be improved to increase the attractiveness of the profession.

With recent revisions of teacher salaries having been made by the Minister of Education (Naptosa, 2014), and an additional general salary adjustment of 7.4% *in addition to* the annual increase of Consumer Price Index plus 1%, the salaries and benefits of teachers appear to have improved somewhat since 2013. With a starting salary for a graduate teacher of a minimum of R185 184 excluding considerable benefits, teaching should become a more attractive proposition for school-leavers.

In addition to revision of the salary scales of teachers in South Africa, the DBE also introduced the Funza Lushaka Bursary Scheme to encourage school leavers to register for education programmes at South African universities (DBE, 2008 in Mampane, 2012). Mampane (2012) does caution, however, that early evaluation of this scheme suggests that take-up appears to have more to do with poor socioeconomic circumstances in the country than with genuine desires to go into education.

It will, however, take time to determine whether these efforts have any noticeable effects on the take-up of teaching by school leavers at the university level, and whether improved remuneration will generate any change in the current attitudes of youth (Cosser and Sehlola, 2009, in Arends, 2011) towards the teaching profession as a whole. Mampane (2012) agrees, and says that extensive studies will be required to determine the efficacy of these mechanisms in attracting young people to the profession.

Despite the problems in the national make-up of teachers, the respondent profile of this study reflects highly similar patterns in terms of age and experience, and so should be deemed suitable for analysis.

Post profile

The sample profile of a 76% teacher post cohort for this study was in close agreement with official PERSAL database findings (Arends, 2007), which showed a distribution of teachers (77%), Heads of Department (12%), and deputy/principals (11%).

Although a slightly higher percentage of Heads of Department were sampled (16%) in this study than the indicated 12% in the PERSAL database (Arends, 2007), the similarity in teacher posts numbers supports the conclusion that the sample is proportionate to the general Gauteng teaching population.

Qualifications

An earlier HSRC/Stanford study by Carnoy and Chisholm (2008) reported that 62% of Gauteng teachers held professional diplomas or certificates (up to REQV 13), while 36% held an academic or professional degree (REQV 14 or above).

DHET/DBE (2011) SNAP survey figures, however, suggest a bleaker picture across South Africa, with data indicating that while 89% of teachers are in possession of *a* professional teaching qualification, only 18% of all its teachers are graduates at an REQV 14 level, which has been the minimum registration requirement for teachers in South Africa since 2007 (Carnoy & Chisholm, 2008).

This study revealed an REQV 14+ figure of 76%, and a REQV 13 or below figure at 20%. The reported qualifications in this study therefore contrast dramatically with the figures cited by media, government and academia (see Hawker, 2013; Sieberhagen, 2011; DHET/DBE, 2011; and Carnoy & Chisholm, 2008).

Despite an apparent divergence from official figures, an important consideration in terms of the generalisability of this sample's qualification levels is Smith's (2008) finding that specific trends exist with regards to survey response-likelihood, since more educated people are also '… more likely to participate in surveys than less educated people …' (Smith, 2008:3). Less qualified teachers may therefore have been less likely to volunteer to complete the survey as more qualified teachers in the sampled schools, thus having the effect of raising the proportion of graduate-level respondents in this study.

On closer examination by units of analysis, respondents who report SAOU and NAPTOSA memberships, as well as those who report no union affiliation, indicate, in general, higher academic qualification levels than those who report membership with SADTU.

With a mean of 23% for the Certificate and Diploma categories across the four units of analysis, 44% of SADTU-affiliated respondents indicated either a certificate or diploma as their highest qualifications, and so demonstrate the highest proportion of under-qualification (according to current registration requirements by the SACE), while 27% indicate degree-based qualifications as their highest qualification compared with the mean of 46%. COSATU's (2012) figures on diplomas conforms to the 44% finding of this study, with its figures for the category at approximately 40% for SADTU.

If one accepts the data from this sample on the basis of other demographic factors being reasonably representative, the sample's reported postgraduate qualifications could, in this case, lead one to infer a growing trend towards improved teacher qualifications. Twenty-four percent of this study's sample reported educational qualifications in excess of the minimum REQV 14. This would support the trend towards improved qualifications identified by Erasmus and Mda (2008, in Carnoy & Chisholm, 2008).

Carnoy and Chisholm (2008) indicate in their HSRC/Stanford study of South African teachers, for example, that enrolments in Education-related qualifications in South African universities show that teachers do appear eager to improve their qualifications (2008:6) and that '… Gauteng teachers are … relatively well-qualified …'.

Carnoy and Chisholm (2008) also maintain that Gauteng educators are not always appointed to teach to their specialisations (Ibid) and so aver that the benefits of improved qualification are not necessarily realised at the ground level of schooling. This claim is in agreement with the DBE/DHET (2011) SNAP survey analysis, which also highlights the inefficient utilisation of qualified teachers (see also Arends, 2011) and so provides further affirmation of this particular phenomenon, despite apparent trends towards improved qualifications.

While it is tempting to draw the tentatively supported (see Carnoy & Chisholm, 2008) conclusion that the level of stated qualifications reflects an increasingly qualified and educationally-focused population of Gauteng teachers, limitations in terms of stated qualifications must be considered in this study. As indicated by Smith (2008), there exists the propensity of educated individuals to answer surveys more readily than less educated individuals, and as such, this conclusion is by no means the only valid deduction. The data result for further education should therefore be used with caution and not necessarily generalised to the broader Gauteng population. Additionally, no assumptions about a concomitant trend in improvement in pupil's future performance should be made, since, among myriad other factors, qualifications do not necessarily correspond to subjects taught (Arends, 2011).

5.2.3 Discussion of findings related to union benefits

With the study establishing that respondents were surprisingly satisfied with the affordability of their union fees (74%), and to a lesser degree, their union's value for money proposition (64%), there was a tacit acknowledgement by respondents that they value some, or all of the benefits that union-membership confers on them. Section 4.3.2 outlined the specific data yielded in relation to respondents' attitudes towards and perceptions of union benefits.

In particular, items related to protection from unfair treatment in the workplace, assistance with legal advice and representation, assistance with promotions, salary increases, and unfair promotions were posited, and are discussed in the section below.

Protection from unfair treatment

SAOU-affiliated respondents in this study indicate a significantly higher belief (84%) that their union protects them from unfair treatment than other unions, with SADTU and NAPTOSA, although still positive, lagging slightly in this regard with 67% and 55% respectively. An overall positive response total of 58% suggests, however, that educators do perceive an ability and/or willingness of their union to protect them from unfair treatment in the workplace.

In the case of SADTU, a measure of how this protection is availed to members exists as a result of COSATU's Workers' Survey (2012). Responses from a question relating to union response when unfair practises were perceived by the member revealed that, in SADTU's case, approximately 70% of COSATU's sample had made contact with their shop stewards, and had been assisted, with the matter either resolved, or in progress. Approximately 20% of the sample indicated that the union had responded, but not assisted, and a further 10% indicated that no response had been received. These results align to the findings for SADTU in this study in terms of protection from unfair treatment.

When asked about teacher unions in general, a large majority of respondents (74%) indicated that they agreed that without strong teacher unions, teachers would be treated unfairly by employers. This may suggest, at the least, a mistrust of the government, as their employer. Surprisingly, the level of affirmative response in this study also mirrors the levels of response in the U.S-based Farkas et al (2003) study, in which between 77 and 81% of respondents agreed that without the union, teachers would be vulnerable to various negative practices.

In the abovementioned study (Farkas et al, 2003), teachers reflected high degrees of mistrust in the system, fearing both bureaucratic decisions and cost-cutting exercises, and thus arguing for the need to secure themselves through the imperfect – in their view – systems of collective bargaining and tenure practices (Ibid).

In South Africa, Neren Rau (2013), head of the Chamber of Commerce and Industry, acknowledges and laments the trend of mistrust and antagonism between worker and employer (Ibid) in the country, arguing that the antipathy results in failure to debate constructively, and brings about an unhealthy reliance on industrial action.

Further evidence of a prickly relationship between worker and employer in South African education is provided by Bascia and Osmond (2013). The authors (Ibid) contend that teacher-government relations in South Africa are 'tense' and complex in terms of both labour relations and education policy. In their opinion (Bascia & Osmond, 2013), implementation of Curriculum 2000 by the Department of Education without having unions on the national curriculum review committee was just one of the antagonistic actions that contributed to this tension, as was the recent bid by government in 2013 to have teaching declared an 'essential service' (Ibid). Additionally, the adoption of more open-market economic policies by the South African government as a whole has, also led to fear of cost-cutting and a significant amount of hostility (Bascia & Osmond, 2013), despite a clear commitment by government to improving the teaching wage (Naptosa, 2014).

As such, the findings in this study in terms of protection from unfair treatment clearly concur with the findings of Bascia and Osmond (2013) and Farkas et al (2003), the latter of whom conclude that for teachers, '[t]heir union is their ally, one they can count on' (Farkas et al, 2003:17).

Assistance with legal advice or representation

SAOU and SADTU-affiliated respondents of this study indicated an exactly similar proportion (79%) of agreement with the statement that their union would provide them with legal advice or representation should the need arise. By far the majority of these proportions (53% of the 79% in both cases) indicated this belief as strong agreement.

NAPTOSA-affiliated respondents also agreed with the statement, although to a lesser degree (66%). A visit to all three unions' websites indicated that only the SAOU (2014) provides an explicit section and contact number for legal advice for its members. SADTU (2014) provides only general contact details for national, provincial or regional queries, but does not specify any legal contact, or provide members with a web-based enquiry-form.

Given the lack of data on the incidence of legal assistance provided by teacher unions to members in South Africa, indications of where these beliefs stem from are by necessity, purely speculative. Although the COSATU (2012) report reveals that its federation members place the need for better legal work by union representatives high on a list of priorities, no differentiation by union is made and so it is impossible to know whether SADTU respondents of that study (COSATU, 2012) are suitably represented in identifying this priority. Specific legal assistance, or the indication of such to SADTU members, must then stem from personal contact with union leaders, information brochures, briefings provided in meetings, or perhaps discussions with other members.

NAPTOSA (2014), while not providing specific legal contact information on its website, does provide a web-based enquiry form for members that could be used for legal queries.

A brief overview of the DBE's legal matters between 2009 and 2012 (DBE, 2014) revealed that of the 39 listed legal cases with the DBE, just three (8%) had unions as plaintiffs. It is, however, difficult to draw any material conclusions from this information, since negotiations between unions and the DBE also occur through arbitration and other, less formal channels, such as the Commission for Conciliation Mediation and Arbitration. The perceptions of the respondents of this study are therefore accepted, with the acknowledgement that the origin of these perceptions are unknown to the researcher.

Assistance with promotions and unfair promotion activities

Much has been made of the apparently 'regular' practice of SADTU in assisting chosen members in obtaining promotions (see Harper & Masondo, 2014; Oxford Analytica, 2013; Msila, 2013; Zille, 2013; Mampane, 2012; Patillo, 2012; Sapa, 2014; Sapa, 2011; Zengele, 2009). Acknowledgement of this alleged practice has also been officially evidenced in Basic Education Minister Angie Motshekga's agreement to investigate allegations of teaching positions for cash against certain SADTU officials (Sapa, 2014).

Harper and Masondo (2014), for example, paint a particularly destructive, although primarily anecdotal, portrait of these practices, with the murder of a KwaZulu-Natal principal, the threatened murder of another principal, and numerous official and unofficial reports of promotions by SADTU for cash – typically R30 000 and upwards for deputy and principal positions. The authors (Ibid) cite another case from KwaZulu-Natal involving the alleged sale, for R100 000, of a director position in the provincial department of education, for which another union has lodged a complaint with the Public Protector's office (Thomson, in Harper & Masondo, 2014).

In another case, findings by the Provincial department of education in the North West indicated that 'SADTU had influenced the appointment of senior officials' (Setswambung, 2012, in Harper & Masondo, 2014). Similar cases were also reported in Limpopo (Harper & Masondo, 2014), and a later report by City Press (2014) details the kidnapping of principals in Mpumalanga and KwaZulu-Natal, and further murder threats and patently questionable appointments across the country (Ibid).

In Gauteng, these anecdotal claims include Free State University lecturer, Nhlanhla Sebele, who holds a doctorate in education, being asked to pay a bribe to Soweto North SADTU official for a principal's position (City Press, 2014).

The same article (Ibid) also notes SADTU Soweto North secretary, Peace Mokiti, as being accused of soliciting sex from one candidate, and demanding money from another in exchange for principals' posts. Questions relating to Mokiti's lavish lifestyle (Masondo, 2014) on his principal's salary have also been raised.

It should be noted for the purposes of determining the credibility of these claims, that the educator who claimed Mokiti demanded sex has lodged formal grievances with the Johannesburg West district director, the Gauteng Education MEC, the Public Protector, Corruption Watch, and Minister Motshekga (Masondo, 2014). The allegations also appear to be supported by a number of other educators with similar experiences, who while willing to speak with Education Department lawyers, speak on condition of anonymity to the press for fear of victimisation (Masondo, 2014).

It was therefore interesting to note that almost half of all respondents in this study (47%) stated that they *did not know* whether or not their union assists its members in obtaining promotions. In the case of SADTU - the union accused of this corrupt practice - only 29% of its respondents agreed with the statement, while the majority (40%) indicated that they did not know.

Perhaps more surprising however, is that despite evidence of open cadre deployment in SADTU (see Harper & Masondo, 2014; SAPA, 2013; Msila, 2013; Zengele, 2013), a full 30% of SADTU-affiliated respondents *disagreed* with the statement that their union assists members in obtaining promotions. It is, however, possible and perhaps even likely, that SADTU's interference with promotions is executed primarily at management level placements, as is suggested in the Zengele (2013) study, and as such, ordinary, post level one SADTU-affiliated candidates in this study, which form 77% of the SADTU sample, may not be aware of their union's potential influence in personnel promotions.

Interestingly, 25% of NAPTOSA-affiliated members thought that their union assisted in promotions, while a substantial 32% of SAOU-affiliated members agreed with this. With little evidence from the media or academic sources to back up the perceptions of the NAPTOSA or SAOU members, this finding is also surprising, although the mechanisms by which assistance are offered, that is, legal or illegal, were not specified in the Item, and so these unions may have other legitimate ways of assisting their members in promotions.

It is clear, however, that the majority of SAOU-members (63%) did not know whether their union assisted them in obtaining promotions, and apart from the unaffiliated members, of whom 89% selected 'don't know', SAOU-members were the most unsure of this response.

There was, however, relative to the question of union assistance in one's *own* union, a great deal more mistrust of the practices of *other* unions in this study, with a small majority of 52% of respondents agreeing that some unions use their influence to unfairly promote members. While only 13% of all respondents disagreed that the practice occurred, responses were, however, reasonably ambivalent, with 35% of all respondents indicating that they did not know.

This could suggest that many teachers are either unaware of the reportedly rampant corrupt promotion practices by unions, or that the problem is simply not as rampant as qualitative literature and media reports suggest (see SAPA, 2014; Oxford Analytica, 2013; Msila, 2013; Zengele, 2013; Patillo, 2012). Alternatively, it may also be the case that respondents are *aware* of this practice but do not assign it particular significance.

Specifically, SADTU, NAPTOSA and SAOU-affiliated respondents were all consistent in their vague mistrust of other unions, with 52%, 55% and 53% respectively agreeing that this practice was indeed occurring. Remarkably, unaffiliated respondents did not demonstrate as high a level of agreement, with only 32% of them agreeing that this practice was occurring, and 52% indicating that they did not know.

Despite SADTU's (2014) official denial of its support of this practice, and its appeal for information in order to 'cleanse the union of such malice' (Ibid), the abuse of power by senior members of its structures is still apparent. To a large extent, the power of SADTU to influence promotion post decisions derives from its alliance with the ANC, through federation union COSATU (Oxford Analytica, 2013). Mampane (2012) agrees that the political alliance between ANC and COSATU is an enabler of this corrupt practice, and argues that the results of it are fierce demotivation of those 'committed and competent teachers who are ultimately lost to the profession' (Mampane, 2012:80).

Patillo (2012) points out that participation in strikes are used as a tool of coercion, with perceptions being that SADTU members who strike are loyal, and therefore more deserving of promotions. She argues (2012), however, that for SADTU, use of cadre deployment was a simple mirror of the practices of the ANC, which normalised the practice throughout government. In this way, the manner in which loyalty and conformity to the ANC was valued and rewarded became the manner in which loyalty and conformity to SADTU was valued and rewarded. The consequences of this are evident however, as Patillo (2012:79) explains:

> *'In order to be rewarded with a high position, potential school leaders in Umlazi first need to prove their loyalty to SADTU and conform to the orders of their branch leadership; they do not*

> *need to worry about proving that they actually have the proven capability and commitment necessary to effectively lead a school.'*

As such, as various authors (see Wills, 2014; Msila, 2013; and Patillo, 2012) point out, the implications of these politically and financially-motivated practices on the quality of teaching and learning, and on leadership practices in schools, are potentially catastrophic for quality education.

Perhaps the strongest academic denouncement of the practice however, comes from Zengele (2013), who argues that '[a]narchy, intimidation and nepotism have characterised the filling of promotional posts in South Africa since 1994.' In agreement with Patillo's (2012) findings, Zengele (2013) posits that this practice has been occurring within SADTU since 1994, and that it has not been restricted to teaching positions, with well-placed union officials being proffered rewarding new positions at district, school, and ministry level.

It also appears that the practice of promotion placement is conducted quite openly, with one unionist describing the process to Zengele (2013:23) as follows:

> *Sometimes the union gives a principal, who is a unionist, the instruction to appoint a certain member. In union terms, the principal is told to deploy a comrade, and he or she is bound to do so… The union will say 'Mr X, you are given a mandate to appoint a SADTU member at the school. The principal has no option but to see to it that the member is appointed.*

Fleisch (2010) also notes open use of the practice in his documenting of the June 2009 illegal strikes in Soweto. He quotes SADTU spokesperson Ronald Nyathi (in Fleisch, 2010:122) as threatening to launch almost 6000 SADTU members in a "'defiance campaign" if the district office did not appoint the individuals that had been recommended by the [SADTU-influenced] SGBs.

The deleterious impact of this practice on leadership and management, resourcing, curriculum, and logistics provision are well documented (Mosoge & Pilane, 2014; Zengele, 2013; Patillo, 2012 in Wills, 2014). Further impacts of SADTU's influence on appointments are, however, also notable on School Governing Bodies (Msila, 2013). Although SGBs are given the authority under the Director General to make official recommendations to the DBE in terms of hiring and promotions (Lesufi, in Harper & Masondo, 2014), these bodies are often 'surprised' with new, often underqualified staff members that they would not have approved or selected. Zengele (2013) argues that these unfair promotions have a significant effect in the generation of mistrust and cynicism by well-qualified teachers who often exceed their new 'bosses' in qualification and experience.

Zengele (2013) notes, with suitable mordancy, that many of those in charge of ensuring that promotional posts at all levels of the DBE are filled ethically and in line with policy, are themselves ex-SADTU members and the beneficiaries of political and nepotistic appointments.

This begs the question '*quis custodiet ipsos custodes?'*, and leads Zengele (2013) to question whether unions have taken over South Africa's education system.

The findings in this study in relation to the topic are therefore interesting in that they do not appear to agree completely with existing literature and media reports (see SAPA, 2014; Oxford Analytica, 2013; Msila, 2013; Zengele, 2013; Patillo, 2012) in terms of extent. It is, therefore warranted that relevant responses to the open question item of the questionnaire in this study be explored for further insight. In total, just five (10%) of the total 49 comments provided in the open questions were coded as relating to unfair promotions, with respondents from both NAPTOSA and SADTU voicing their concerns about the practice:

NAPTOSA member 01:

> *"When it comes to Sadtu I don't like it because if you apply for any post at Soweto and they find out that you are NOT a Sadtu, you will never get a post there. That is why I strongly agree with the statement that said some unions use their influence to unfairly promote thier members. Unions are just like politics, there is a lot of corruption."* [verbatim]

SADTU member 01:

> *"SADTU STARTED AS THE ONLY BIG UNION TO ASSIST EDUCATORS' CHALLENGES BUT ALL HAS GONE DOWN. TEACHERS' IMAGES HAVE BEEN DENTED SO SAD. IT IS ALL ABOUT PROMOTIONS AND NOT EDUCATION OR OUR CHILDREN"* [verbatim]

SADTU member 02:

> *"At times the unions give some of their members posts as a reward for being active in the union. This affects the standard of education."* [verbatim]

NAPTOSA member 02:

> *"Some teacher unions benefit their members through promotions of posts. Some teacher unions are concern about their members workplace benefits. If you belong to a certain union you will never get a promotional post especially in certain areas."* [verbatim]

Perhaps the most impassioned comment yielded from the open question of the survey, however, came from a NAPTOSA-affiliated respondent, who pleaded for investigation into the practice:

NAPTOSA member 03:

> *"MY GREATEST CONCERNS ARE CONCERNING SOME UNIONS IS THE FIRST FACT THAT WHEN IT COMES TO THE FILLING OF POST DURING THE INTERVIEWS, WE SEE ALOT OF PREJUDICE AND THE UNFAIRNESS, REGARDING THE PROCESS, SOMEONE GETS A POST OR POSITIONS, WHEREBY THAT PARTICULAR INDIVIDUAL DOESN'T QUALIFY TO GET THAT POSITION, MOST OF THE TIME THOSE POSTS ARE SECURED FOR CERTAIN INDIVIDUALS AS KICK BACKS, THIS IS WHAT KILLS OUR EDUCATION SYSTEM IN THIS COUNTRY, PEOPLE ARE INTERESTED IN SECURING POSTS, NOT FOR A GOOD COURSE, BUT FOR THEIR INDIVIDUALS SELFISH GAINS, MY PLEA IS THAT THIS ISSUE SHOUDL BE LOOKED AT VERY SERIOUSLY."* [verbatim]

It is also interesting to note that in most cases, these respondents do not specifically state SADTU as the culprit, but refer rather to more generic 'unions' or to 'some unions', although the reasons for this will not be speculated on in this study.

Regardless of the incidence of these five qualitative points in the survey however, the descriptive quantitative findings of this study do not appear to support the extent of the rather cataclysmic conclusions of Zengele, who claims that while not all management positions in the Department of Education are filled by SADTU members, '…most of them are' (2013:23), citing 'anarchy, intimidation and nepotism' (2013:18) as the order of the day in the filling of education positions in post-democratic South Africa.

As indicated previously, the weighting of the sample group of this study is reflective of the general educator population, and, as a result, features more opinion from teachers than from those who would potentially be seeking promotion to principal or vice principal.

That said, Diko and Letseka (2009, in Letseka et al, 2012) report that the practice occurs from post level two, and so the possibility of impact on current post level one employees remains. As such, while the results of the statement item relating to personal unions may be a consequence of the larger post-level one demographic in this study, it is difficult to make use of the same result for the statement item relating to unfair promotions by 'some unions'.

It is, of course, possible that the GDE, as one of the more successful education departments in the country by measure of National Senior Certificate pass rates (see Motshekga, 2014), exhibits a reduced incidence of unfair promotions in comparison to other provinces, potentially resulting in respondents of this study being less inclined to credit the problem. Indeed, the absence of mention of Gauteng in Harper and Masondo's (2014) first report on the matter may suggest as much.

That said, Zengele's (2013) study was situated in the D11 and D12 districts of Gauteng, and as evidenced above, complaints about this corrupt practice were also seen in the open question item of this study. Additionally, Masondo's (2014) and City Press' (2014) later reports also detailed particular cases in which these practices had been reported. It is therefore difficult to align the more moderate quantitative findings of a 52% agreement with the existence of unfair promotions in this study, with the more pervasive pictures obtained in some of the qualitative literature (see Zengele; 2013; Letseka et al, 2012; Mampane, 2012; Patillo, 2012).

Assistance with salary increase

Teachers in this study were relatively clear that they saw the involvement of their unions as a critical factor in their remuneration, with 61% of the unionised sample agreeing that without union involvement, they would not be given salary increases.

Although SADTU-affiliated respondents indicated slightly higher attitudes of agreement with regards to this question, a majority agreement from both NAPTOSA and SAOU indicates that this is a consensus agreement across unions. These results suggest that a fair proportion of teachers do not believe that government is naturally inclined to act in the best interests of its employees.

When asked to rank their most desired items from their employers, namely wage increase, housing/transport, bursaries, or health benefits, for example, SADTU members in the COSATU (2012) study overwhelmingly selected the 'wage increase' option. SADTU members also indicated their most important reasons for belonging to their union as a split between assistance with wages, working conditions and benefits, and protection in case of dismissal (COSATU, 2012), and so demonstrate a clear expectation for action on wages by their union. The COSATU (2012) report also asserts that while wages were an area of great importance, they were also the area in which members were least likely to be satisfied with union endeavours.

Although there is clear agreement in this study, it is interesting to note that teachers sampled in the US-based Farkas et al (2003) study felt even more strongly about the effects of unions on salaries, with 81% of respondents agreeing that without union involvement, salaries would be much worse.

SADTU is renowned for its 'typically robust' (Oxford Analytica, 2013) salary negotiations, with strikes and battle-call rhetoric being frequent tools of persuasion (see Nicolson, 2014; Oxford Analytica, 2013). For example, despite substantial increases and salary adjustments, which were effective in April 2014 (NAPTOSA, 2014), SADTU General Secretary George Maluleke demanded a further 15% salary increase for teachers, along with further housing and medical benefits, just months later in October 2014 (Nicolson, 2014). Maluleke dismissed explanations by President Zuma that teacher salaries were currently under review, said that SADTU could not wait, and that it would 'fight… for teachers to get the same benefits as some other public employees' (Nicolson, 2014). In addition to these public media statements, quotes like '…the day [our] militancy stops, so will [our] existence' (Heystek, 2001:227) by SADTU Gauteng's Secretary General, serve to intensify this popular perception of SADTU's 'robust' negotiation tools (Oxford Analytica, 2013).

With 66% of SADTU-affiliated respondents in agreement with the statement that without their union, they would not receive increases, one could speculate that, given the combative stance taken by SADTU, and its propensity to 'negotiate' by strike (Wills, 2014), members of this union are offered tangible 'evidence' that their union is actively seeking improved wage conditions for them.

Incidentally, while not within the purpose or ambit of this study, if one were to loosely apply Social Identity Theory (McLeod, 2008) to the SADTU-affiliated respondent findings on this item, the combative actions of the union may actually serve to place the employer (government) in the role of an enemy, thus intensifying 'us vs. them' divisions (Dawes et al, 1988), and further entrenching identification with, and dependency on SADTU. Although this particular scenario is purely speculative, use of 'tough' negotiations with regards to salaries may therefore serve a dual purpose for SADTU.

The ELRC (2013) bargaining units for Gauteng provide for eight SADTU-representatives, and six 'other-union' representatives, with most unions in the 'other' group, such as NAPTOSA and SAOU, being disinclined to strike (Heystek & Lethoko, 2001). A reliance on negotiations suggests, perhaps, that the second bargaining unit of Gauteng as outlined in the ELRC (2013) document are slightly less hostile opponents for government than the notoriously militant SADTU (Heystek & Lethoko, 2001), which makes up the first bargaining unit. Given the weightier collective bargaining power of SADTU (ELRC, 2012) however, it is difficult to conclude whether the 'softer', more reasoned approach by SAOU and NAPTOSA noticeably benefits salary negotiations, or whether any significant benefits are the result of SADTU's willingness to 'ransom' the education of South African children (M&G Editorial, in van Onselen, 2012).

With specific regards to this study, respondents' apparent satisfaction was investigated further by examination of the three main unions' websites. Despite any uncertainty with regards to the specific reasons for government's recent capitulations in wage negotiations, it is, however, evidenced that all three unions consider wages an essential component of their services by their provision of both extensive updates on negotiations, and the latest salary tables (NAPTOSA, 2014; SADTU, 2014; SAOU, 2014).

5.2.4 Discussion of findings related to experience of union membership

Respondents were asked to complete a number of items around the theme of their experience of union membership, including consultation by their union, the ways in which their unions negotiate salaries, their experience of pride in membership, and in their preferences for union membership as individuals, and in principle. This section provides a discussion of the findings around these topics.

Consultation and communication on educational issues

The majority approval of the way that unions communicate with their members from all union-affiliated respondents was surprising given that some of the qualitative literature relating to unions in South Africa argues that an area of particular concern in teacher unionism is the perception that unions do not really 'hear' their members' (Naong, 2007).

In this regard, it is interesting to note that the most selected option for improving support for unions in COSATU's (2012) study was the need for better communication from the union on its work. While the finding in the COSATU (2012) study does not differentiate this finding to specific unions, it does break down the method of reporting back on negotiations by union. In SADTU's case, over 85% of respondents in that study (COSATU, 2012) reported use of meetings, with just 8% indicating use of SMS. Since the overuse of meetings and lack of use of technology to communicate were also raised in this study (in item OQ30), these points may add a further degree of reliability to the findings of this study.

Despite the overall approval of the communication degree and level in this study, it did, however, obtain qualitative input from 11 respondents in the single open question of the survey, which suggests that communication is, indeed, an area of frustration for some union members. It is important to note though, that all respondents who did complain about communication in this open question, rejected outright the idea of not belonging to a union, as evidenced in the samples in Table 17 below:

Table 17: Comparison of selected negative comments with overall satisfaction with union membership

Open Question Comment (Item OQ30)	Pride in being a member of union (Item B23)	Preference not to belong to a union (Item B24)
Respondent 01: *"A union … should be knowledgeable about the information they give to their members in meetings, not speak to us about rumours but give us facts".*	Don't know	Strongly disagree
Respondent 02: *"Sometimes they do not involve us in decision making."*	Strongly agree	Strongly disagree
Respondent 03: *"Some of the meetings we attend are not very structured and are a waste of time and money. Better communication via emails would alleviate this problem. Travelling to and from meetings just to have information read to us is really not fruitful."*	Somewhat agree	Strongly disagree
Respondent 04: *"Some of the meeting we attend are really waist of time and money. The union could have sent us emails/letters to inform us about certain issues."*	Somewhat agree	Somewhat disagree
Respondent 05: *"Some teachers' unions (not mine) are not confidential when a dispute arises between a staff member and a principal. The principal is contacted when a discussion or question is asked. Senior staff members should not be part of the unions structures."*	Don't know	Strongly disagree

* Respondents are coded using consecutive numbers for illustration purposes. Responses are displayed verbatim.

Although Respondents 01 and 06 in *Table 17* indicated neutrality about feeling pride in their union membership, it is clear that despite any negative comments from respondents about union communication, all respondents in this selection demonstrated a clear preference to remain unionised.

In consideration of this qualitative and quantitative evidence, albeit slight, it is possible that the removal of the qualitative 'magnifying glass' through having taken a broader quantitative approach, may have implications for some of the popular perceptions about teacher unions. Should the findings of this study be accepted, it becomes possible that the presence of often severely negative attitudes as described in qualitative literature around South African unions (see Msila, 2013; Zengele, 2013; Letseka et al, 2012; Patillo, 2012; Zengele, 2010; and Shermaine, 2008) may, in fact, be overly amplified in the absence of contextualising quantitative descriptive data.

Pride in union membership

With 82% of all unionised respondents agreeing with the statement that they were proud to be a member of their union, it is clear that a considerable majority of central Gauteng teachers view their unions in a positive light. This agrees with COSATU's (2012) conclusion that the majority of their members were mostly satisfied with their unions' services. Interestingly, though, despite two SADTU-affiliated members sending 'I ♥ my SADTU! *Viva SADTU!*' messages in the open question item of the questionnaire, both SAOU (with 84%) and NAPTOSA (with 82%) scored slightly higher in the pride stakes, with 80% of SADTU-affiliated members agreeing with the statement.

In comparison with SADTU and NAPTOSA, who both entertained fair portions (13% and 11% respectively) in the neutral option, not a single SAOU-affiliated respondent indicated neutrality about pride in their union. In fact, despite the smaller membership numbers, the SAOU appears to be the union most highly rated by its own members in this study overall, with scores for this union frequently the highest in the various items of this survey.

Ultimately though, there seems little difference between the unions with regards to their level of pride in their unions, with all three unions' respondents indicating an almost unequivocal pride in their membership.

Preferences for unionism

As reported in Chapters 3 and 4, potential difficulties were envisioned with responses to the item that measured respondents' attitudes to the statement that they would prefer not to belong to any union at all, due to its negative phrasing.

It should therefore be noted that a majority disagreement (72%) with the statement by all three unions' respondents is in accord with data relating to overall satisfaction of teachers with their unions (see description of items B09; B10; B11; B12; B18; B20; B23 in Chapter 4). As such, while any difficulties with the question may have yielded outlier instances, it does not appear to have affected the overall trend of approval of teacher unions. The item may therefore add a measure of internal reliability to the study.

Comparison of the various complaints (see Addendum B, Open Item Themes) with the associated responses to Items B23 and B24, revealed that, as with the trend identified in *Table 17* in relation to communication problems, respondents are nevertheless overwhelmingly satisfied with unions. As the COSATU (2012:47) report concludes, '[o]verall satisfaction with union services is fairly high, although there is room for improvement'.

Taken in conjunction with other measures of satisfaction in the questionnaire, it should therefore be accepted that while issues have certainly been raised by union members in this study, they are wholly positive to remaining unionised.

Attitude to negative freedom of association

From the discussion under preferences for unionism, it is clear from the majority of items in this study that teachers perceive their unions in a positive light, and that they would choose to remain unionised. Interestingly then, if respondents interpreted the question on forced union membership correctly, their responses indicate a clear preference for voluntary union membership.

In fact, the results of majority of teachers (66%) in this sample do *not* believe that teachers should be forced to belong to a union. Simply put, respondents in this study appear to wish to be able to *choose* to be unionised, and not forced into it. Given the option, by all indications, a full 72% would join a union.

Interestingly, the SADTU-affiliated members, who demonstrate on occasion the highest intensity of satisfaction and loyalty in this survey, indicate the highest level of agreement with this statement (71%) and thus disagree the most with the enforcement of union membership.

Negative freedom of association, which is an important concept in this regard, is described by Eurofound (2007) as 'the right of individuals to refuse to associate with others in collective organisations' such as trade unions. In South Africa, however, collective bargaining agreements in particular contexts, such as education, do not allow for this (European) right, providing instead the option of payment without membership should an educator not wish to become unionised.

Approximately 9% of the respondents in this study fell into this unaffiliated category. It was therefore notable, and unexpected, that only 60% of these respondents expressed rejection of forced membership, and a question emerges as to why the remaining 24% who agree with forced membership do not belong to a union.

Only two unaffiliated respondents in this study provided any clarity on possible reasons for this, with one indicating that he had 'applied for NAPTOSA membership but never received a response', and another explaining that he was currently on temporary contract and did not know whether or not it would be extended. The reasons of the remaining 23 unaffiliated respondents in this study remain, however, unclarified.

5.2.5 Discussion of findings related to strike action

Strikes are a significant feature in the South African union literature (see Bascia & Ormond, 2013; Msila, 2013; Zengele, 2013; Patillo, 2012; Letseka et al, 2012; Fleisch, 2010; Kallaway, 2002; Heystek & Lethoko, 2001; Moll, 1991; and Hyslop, 1990 in Fleisch, 2010) and so form an important component of this study.

With there being little realistic idea of what teachers' attitudes towards strikes are given the absence of current quantitative literature on the subject, but an apparent thirst for strikes being demonstrated by the media (see Fleisch, 2010), three different statements were used in this study to obtain quantitative data on the attitudes towards strikes.

Figure 16 in Chapter 4, reveals therefore that a very particular parallel trend in attitude towards both legal and illegal strikes exists within the unions themselves, with SADTU-affiliated members being most supportive, and SAOU-affiliated members being the least supportive of all forms of strike activity by teachers. There appears, however, a very clear trend towards declining support for the use of unprotected strikes.

That said, the frequent standoffs between the South African government and teacher union SADTU are well-documented (Oxford Analytica, 2013), with reports by COSATU (2012) acknowledging this with 80% of SADTU-members reporting that they had participated in last strike action at their workplace. Taken with the evidence that SADTU was responsible for 42% of total worker days lost across the country between 1995 and 2009 (Wills, 2014), it appears from various literature and media reports as though teachers are quite eager to strike. The findings of this study, however, reveal a different picture.

As such, the results gleaned regarding teacher attitudes to strikes are perhaps the most interesting finding of this study, with very clear trends visible both within individual units of analysis, but also, and perhaps more intriguingly, across *all* sampled respondents of this study.

Attitude to protected (legal) strikes

Although the findings of this study clearly support, to an extent, the use of strikes to achieve union objectives across all union members, SADTU, perhaps unsurprisingly given its depiction in literature as 'strike happy' (Msila, 2013), featured as the most in-favour of engaging in protected strikes, with 83% of its respondents agreeing with the practice to some degree (and 50% of the 83% feeling strongly about it).

Interestingly, a majority of both of the more (traditionally viewed) 'professional' unions NAPTOSA (58%) and SAOU-affiliated respondents (52%) also agreed with the statement, to lessening degrees, despite their union leadership being notoriously reluctant to strike (Heystek & Lethoko, 2001). Members within these two units of analysis were, however, equally split between strong agreement, and some level of agreement.

By far the most potent reason provided for participation in strike action according to the COSATU (2012) study was demands for improved wages. Given the National Planning Commission's (NPC) conviction that 'South Africa's state-system teachers are among the world's highest paid in purchasing parity terms' (Oxford Analytica, 2013), and recently substantial increases and adjustments to teacher pay scales (NAPTOSA, 2014), it might be reasonable to draw the conclusion that strike action in the education sector may not be as necessary in the upcoming short-to-medium term. However, recent statements by SADTU's General Secretary (Nicolson, 2014) reveal that an appetite for strikes - based in this case on demands for further wage, housing and medical benefits – somehow remains.

An interesting hypothesis that Patillo (2012) presents is that a false dichotomy has been created and nurtured by SADTU: one which creates the impression that leaders at the school level are required '… to choose between a high quality education to their students, and fighting for their own rights as teachers.' (Patillo, 2012). This dualistic view would thus increase likelihood that strikes, whether legal or illegal, would be used to resolve areas of difficulties with the state, at the expense of learner education.

In a similar vein, but perpetrated by the state, Govender (2008) argues that the two concepts of professionalism and unionism have traditionally been framed as mutually exclusive by the state in order to control more 'radical' behaviour and demands by unions. This view is also difficult to argue with if one examines the literature presented in Chapter 2, which frequently depicts the polarities of either 'professional' or 'militant' unions.

It becomes difficult, however, to draw such a clear line between professional or unionised members when examining the results of this study. Govender (2008) argues that the state may make use of the ideology of professionalism to control teachers, but that teachers may then, in response, use professionalism in 'self-defence' (Govender, 2008:64) to avoid being side-lined by government.

As is discussed in the following sections, with SADTU-affiliated members demonstrating clear desires for professionalism in the practice of teaching, and NAPTOSA- and SAOU-affiliated respondents demonstrating a willingness to engage in legal strikes, the traditionally-imagined line between professional and unionism appears faint.

Attitude to unprotected (illegal) strikes

During the gauntlet of strikes by SADTU in 2010, SATDU spokesperson Numsa Cembi claimed that members were 'keen to go on strike; they don't need to be intimidated to go on strike' (in Patillo, 2012: 52-53). The findings of this study, do not, however, support this claim.

Fleisch (2010), using media sources, documents a two-week strike by the Soweto branch of SADTU in June 2009, which was, unusually, not related to wages, but to a promotion made by the district office. Fleisch (2010:123) describes the use of violence, intimidation, the absence of teachers from Soweto schools, and notably, a '…*de facto* authority…' by SADTU militants with regard to both education departmental functions and the 'disciplining' of schools who had displeased them.

Notably, there was clear evidence of the Soweto branch spokesperson Ronald Nyathi (2009, in Fleisch, 2010:123) demanding 'total disengagement' from educators until further notice, and further comments from the same source threatening that 'schools found operating … would be disciplined'. Shockingly, Nyathi threatened that while SADTU would not '… go and do anything but something dramatic [would] happen to them. Some people will lose their cars. Some people will be admitted to hospital' (in Fleisch, 2010:123). Despite the national SADTU office distancing itself from the illegal strike, and the Labour Court issuing a restraining order against SADTU, the 'defiance campaign', fuelled by Nyathi's rhetoric of intimidation, continued to feature in media reports (Ibid).

Similar acts of intimidation and involuntary participation in strikes are documented in a number of other studies (see Wills, 2014; Msila, 2013; Patillo, 2012). Msila (2013), for example, draws the conclusion that since teacher unions like SADTU were vital in the apartheid struggle, some of its members may still view the union's role as a combative one – with teachers opposed against the government, which represents an unjust system. This conclusion may fit neatly with earlier discussions relating to the application of Social Identity Theory to the SADTU's apparently antagonistic attitude to its members' employer. That said, the findings of this study do not appear to agree that teachers wish to see themselves in this way.

While President Jacob Zuma's subsequent hardening of stance towards SADTU and the threat of criminalising teacher strikes in 2013 (Oxford Analytica, 2013) may have resulted in some tension between unions and government at the negotiating table (Bascia & Osmond, 2013), it appears as though teachers in this study position themselves - unequivocally - in the government's corner on this topic.

A significant 79% of unionised respondents in this study disagreed to a large, or to some degree with the use of unprotected strikes. Of note is that a considerable portion of this group (68%) strongly disagreed with the practice, with SAOU-affiliated respondents demonstrating a massive 84% strong disagreement with the practice, and zero incidences of 'some agreement'.

Interestingly, even SADTU members, who are well-known for their engagement in teacher strikes – whether protected or not – indicated a 69% rejection of the practice, with just 25% of its sampled members supporting this format of strike.

Poole's (2007) conception of teacher unionism as an expression of organisational justice may reveal an interesting point of speculation with regards to this finding. Her argument (Ibid) that shared norms and values within a particular, cohesive group may become the dominant values of individuals within the particular group itself appear to be supported by members of NAPTOSA and SAOU, who, in keeping with their more 'professional' image, clearly express their disapproval of unprotected strikes. There are, however, indications that SADTU might be facing a predicament in terms of shared norms, specifically if one examines member attitudes revealed in this study in relation to the approach by SADTU leadership itself. With SADTU-affiliated respondents in this study clearly rejecting the use of unprotected strikes, there, in this point at least, appears to be a disjoint between individual members' sense of justice, and the larger organisation's norm.

Comments from the open question of this study relating to strikes revealed some of the reasons that respondents had lost their appetite for strikes. While there is little evidence from these

comments that teachers are rejecting illegal strikes for the sake of teaching and learning, in fact their motivation seems, on occasion less than altruistic, there is, nevertheless a trend away from illegal strike support, as seen below:

SADTU Respondent A:

> *The reason why so few teachers go on strike is because of that 'no work no pay' policy. The teachers that go on strike gets their salaries docked while the teachers that don't join the strikes gets their full salary but also enjoys the benefits that other teachers fought (strike) for.*

NAPTOSA Respondent B:

> *Unions should stop all strikes*

SADTU Respondent C:

> *There is no point in striking if we never get what we are striking for - we always give in so why strike?*

Damage to teacher reputation due to unprotected strikes

Although the few strike-related comments (in Item OQ30) provided by respondents in this study do not reveal a great deal of variety in terms of their reasons for rejecting unprotected strike actions, a 77% agreement with the item relating to the impact of illegal strikes on the professional image of teachers may suggest that teachers are becoming deeply concerned about their professional reputation.

In South Africa, a history of unprotected strike action, predominantly by SADTU-members, has then, in the minds of the respondents of this study, certainly damaged their professional reputations. Wills (2014:5) argues that, in particular, the '…militant activities of SADTU have created negative sentiment about teachers in a country that can ill-afford the de-professionalization of teaching where capable and qualified teachers are desperately needed'.

In particular, Wills (2014) highlights the important socio-political point that industrial action in South African schools has the effect of exacerbating inherited inequalities from the Apartheid-era, since teachers in under-privileged schools, represented predominantly by SADTU, are more likely to strike than those in privileged upper quintile schools, whose teachers are more likely represented by NAPTOSA and SAOU. The calculated long-term impacts on teaching and learning, and ultimately

on the professional credibility of teachers willing to participate in these actions, are therefore severe (Wills, 2014).

Govender (2008) provides an interesting context in his explanation of the more orthodox conceptions of professional, versus unionised, teacher unions. He (Ibid) argues that the tension between these two diametrically-opposed views is based on the focus by the professional factions on enhanced service provision, training and intellectual capacity, versus the focus of traditional unionism on more 'bread-and-butter' issues such as pay and conditions of service.

The use of militant actions by the unionised groups (Hindle & Simpson, 2003 & Sang, 2002 in Govender, 2008) has therefore, over time, imparted the view that unionised members are somehow less concerned with the quality of service and personal development. Similarly, to bring in Patillo's (2012) argument, those from the 'unionism' view may see their bargaining power as an either-or scenario, in which they either need to protect their rights, or engage in professional activities. This oversimplification of a multifaceted dynamic by certain union members cannot serve to improve the reputations of teachers in South Africa.

Govender (2008) presents, however, an argument for a new perspective on teacher unionism – one that sees '… unionism as an expression of professionalism' Ozga and Lawn (1981, in Govender, 2008:64). The findings of this study support this more progressive stance on unionism, with respondents demonstrating a moderate willingness to engage in typically union-related activities, but not at the expense of their professional reputations. This rejects the more traditionalist bimodal view of an organisation as either purely professional, or purely unionised in nature.

5.2.6 Discussion of findings related to performance evaluation

While performance evaluation was not a main area of focus of this study, its cursory inclusion yielded an interesting result in terms of the stated willingness of respondents from all unions, including SADTU, to engage in performance evaluation, and does, perhaps warrant some mention.

A highly contentious issue related to teaching and learning is the ability of government, who is in this case an employer, to determine the skills and salary level of its employees through performance evaluations (see Mosoge & Pilane, 2014; van der Berg *et al*, 2011). Historically, there has been considerable union resistance to the idea of performance evaluations, most notably from SADTU (Ibid). It is perhaps surprisingly then that a total of 83% of unionised respondents agreed with the statement that they would welcome efforts by their union to set standards for evaluating teacher performance.

While this appears to reflect a positive attitude towards union performance evaluation measures, it should be remembered though that the phrasing of Item B19 only allows the description of support for performance evaluation if unions are involved in deciding on the performance evaluation efforts. Support of the statement does not necessarily equate to support for performance evaluation as a tool in general. As De Clercq (2015) points out, this could instead reflect dissatisfaction with the current evaluation tools, rather than positivity towards a union-developed performance evaluation tool.

As such, although this survey aimed to reveal attitudes and perceptions of teachers relating to theirs and other unions, further questions on more generic performance review attitudes would be interesting for future studies, and an extra question would be considered should the instrument for this study be used again.

5.2.7 Discussion of findings related to teaching and learning

Heystek & Lethoko (2001) argue that teacher unions play a pivotal role in improving the culture of teaching and learning (COLT) in South African schools, and Bascia and Osmond (2012) agree. In their interviews of various union officials, Heystek and Lethoko (2001) examined union perceptions on teacher professionalism and its relationship to teaching and learning. As Govender (2008) points out in his study though, the term professional proves to have different connotations to different unions. SADTU, in the Heystek & Lethoko (2001) study, sees the moniker of professional as given, simply through their teachers' registration with the South African Council of Educators (SACE).

NAPTOSA and SATU however, emphasise the roles of qualifications and their positive correlation with motivation, performance and professionalism (Heystek & Lethoko, 2001). A significant distinction between SADTU and NAPTOSA (Heystek & Lethoko, 2001) in the study was that, by necessity, NAPTOSA indicated an outright rejection of mass action was necessary for an image of professionalism.

SADTU, however, argues that if working conditions were more conducive to teacher motivation and teaching and learning, then there would be no need to strike (Heystek & Lethoko, 2001). The impasse of this study suggested then that SADTU leadership would continue to use mass action in order to meet its goals, and according to Msila (2013), would therefore continue to jeopardise the quality of teaching and learning in South African schools.

Two main areas of interest relating to the teaching and learning practices of South African teacher unions were included under this theme, including the participation of unions in developing education policy, and in the provision of useful teacher development workshops.

Involvement in developing education policy

Govender (2008:59) argues that teacher unions in South Africa have a '… close but ambiguous relationship with the state in the policy arena', due to their need to influence policy in the interests of its members, but also – although not always - in the interests of consensus building with the state and its objectives. Teachers are therefore caught in the proverbial middle, and as such, Govender (2008) presents the view that teachers are locked in perpetual skirmishes with the state over policy creation and ownership.

With this in mind, perhaps a surprising finding in this study was that the majority of unionised respondents in this study indicated that they felt their union plays a positive role in developing education policy in South Africa, with all unionised respondents reporting at least a 67% belief that this was the case.

In NAPTOSA's case, Govender (2008) says that despite its 'political distance' from the ANC (Ibid), it has succeeded in gaining credibility as a respondent in the policy domain through its affiliates who demonstrate sound legal expertise in educational law and its processes, and who are thus able to contribute to policy submissions more effectively than SADTU (Govender, 2008). There is also clear evidence of policy development on both NAPTOSA's (2014) and SAOU's (2014) websites and as such, the findings of this area of enquiry in the study are supported by documented evidence.

Mosoge and Pilane (2014), despite the slightly lower incidence of agreement by SADTU-affiliated respondents in this study, argue that SADTU has also engaged significantly in the framing of South African education policy, citing the union's rejection of linking pay progressions to outcomes of the Integrated Quality Management System as evidence of this. Mosoge and Pilane (2014:9) go on to indicate, however, that in the case of performance management and appraisal at least, SADTU has also called for the suspension of these to allow for more time to conduct 'relevant research', further exacerbating conflict between government and SADTU.

While SADTU denies (2012) that it ever refused performance agreements, it has, to many observers (Msila, 2013; Govender, 2008; Heystek & Lethoko, 2001) appeared to play a more antagonistic than helpful role from the perspective of government in policy development and implementation. As Govender (2008: 531) comments, SADTU's original approach to policy included the hiring of lawyers and mere tokenistic '… representation on policy committees and forums'. This combative, legal

approach was subsequently supplemented with mechanisms such as lobbying (Ibid), an addition which perhaps proffers tacit acknowledgement of the shortcomings of the earlier approach (Govender, 2014).

That said, despite SADTU's apparent shortfalls in terms of developing rigorous and consensual policy in collaboration with government, as agents of teachers, there is apparent agreement from its members – in this study at least - that they are, to a slight majority, in agreement that their union plays a positive role. As such, perhaps consensus and compliance is less important to SADTU-affiliated respondents than their union's ability to prevent apparently untenable policies from being implemented.

Teacher development workshops

Mosoge (2014:15) suggests that "teachers, as co-developers of educational policy through their participation in union activity and as implementation of policy on the ground, act as the driving force behind the actualisation of transformation in education. The development of teachers is therefore crucial in an education system experiencing an overload of policies. While this approach is clear in the case of both NAPTOSA and SAOU in this study, SADTU-affiliated respondents indicate that this is, perhaps, an area of required improvement for their union.

NAPTOSA and SAOU have a documented history of providing teaching and learning opportunities (see NAPTOSA, 2014; SAOU, 2014). In Heystek and Lethoko's (2001) study for example, NAPTOSA's concern over a lack of COLT (Culture of Teaching and Learning) in schools lead to the development of numerous workshops in underperforming schools. In the case of NAPTOSA-affiliated respondents in this study, their Gauteng branch also provides clear indications of available courses. These are included as detailed three-month cycles on its website (2014) under the title 'Professional Development Programme'.

Annual information brochures of professional development courses for the current and planned year ahead are also included on the website, and reveal a plethora of practical, relevant courses including titles such as 'Barriers to reading', 'The kids are hell: what can I do?', and 'Understanding cognitive levels'. With the launch of its Professional Development Institute (PDI) in December 2013, NAPTOSA has also demonstrated clear commitment to its role as a professional developer of its members.

SAOU (2014) too provides a clear 'Courses for the term' link on its website, which provides information on courses relating to curriculum, school management, ELSEN and ECD, with additional offers to study options through the University of the North West.

As such, the extent of support for this statement from these two unions is perhaps unsurprising, with 84% of NAPTOSA members, and 74% of SAOU members indicating the presence and value of union-provided workshops.

That said, despite SADTU traditionally being teacher, and not learner focused (Heystek & Lethoko, 2001), and therefore being less inclined than NAPTOSA and SAOU to provide teaching and learning workshops, recent developments at SADTU do reveal tangible improvements in this regard. Not to be bested by a critical report by Adcorp's Loan Sharpe, who bemoaned the union's deleterious effects on education in South Africa, SADTU (2012) defended its 'significant role' in formulating the Integrated Strategic Planning Framework for Teacher Education and Development in 2011. In this letter (Ibid), SADTU also claims the establishment of its own teacher development centre, the Curtis Nkondo Professional Teacher Development Institute, and provision of CAPS training to over 20 000 teachers in the 2012 period (SADTU, 2012).

The SADTU-respondents in this study, while perhaps not as impressed with these achievements as SADTU leadership (Ibid), do show some signs of satisfaction, with 58% indicating that they received useful workshops and/or training from their union. There is, however, in comparison with the two other measured unions, a clear gap in workshop and teacher-development provision on the part of SADTU according to the findings of this study.

5.3 Conclusions

This research study set about to seek a quantitative, and therefore generalisable, view of teacher unions in Gauteng in order to establish a more accurate picture of the attitudes and perceptions of teachers with regards to their unions. Specifically, after identifying the demographic profile of the surveyed respondents, it sought to resolve three main research questions.

The demographic profile revealed that the typical respondent of this study was a female teacher between the ages of 40 to 49, who is in possession of an REQV14 qualification, and who has between 10 to 19 years' of experience. This is, to a large degree, in line with official and other literature data on teacher make-up in Gauteng. NAPTOSA, SADTU, SAOU and Unaffiliated members were represented in this study as units of analysis and both similarities and differences within and between units of analysis were evinced.

The first research question related to the attitudes and perceptions that teachers hold about their unions in general. In this regard, it is clear that most respondents demonstrate a surprising level of both identification and satisfaction with their unions. In terms of union fees and particular benefits, teachers demonstrated approval with their union's ability to provide them with legal representation, protection from unfair treatment and with the salary negotiations. They also showed approval of their union's involvement in teacher development, policy negotiations, and, in most cases, with the quality of workshops provided.

Where concerns were raised, respondents still demonstrated a willingness to remain unionised. Interestingly, along with all other units of analysis of this study, SADTU-affiliated respondents demonstrated little identification with regards to the union's deployment of unprotected strikes, and unequivocally rejected the practice.

Importantly, complaints about the unions raised by some respondents in this study did not suggest, in the least, that teachers would rather not belong to their unions. In fact, despite the majority of respondents overwhelmingly indicating that they should not be *forced* to belong to a union, most indicated that they would, even given freedom of negative association, *choose* to be unionised.

For the second research question, themes looked at the particular aspects that teachers of different unions support or reject. Surprisingly, although there were certainly trends detected in terms of the degrees of agreement or disagreement, there was a high level of similarity in trends across the three measured unions on most matters in this study.

It was clear from the study, for example, that SAOU-members feel more positively towards their union than other respondents do. These responses also suggested that SAOU-affiliated respondents' report a higher degree of professionalism within their union. Similarly, NAPTOSA-affiliated respondents demonstrated perceptions that value a professional approach to education. SADTU-affiliated respondents, while not as focused on professionalism, did nevertheless demonstrate the same nature of attitudes, but to a slightly lesser degree. In the area of union assistance with promotions, most respondents, including those in SADTU, indicated a neutral response.

The final research question examined whether teachers' perceptions and attitudes support or contradict the findings of current qualitative literature on South African teacher unions. In this regard, findings were frequently different, dependent on the unit of analysis examined. Since literature on unions may, according to Patillo (2012), depict a false dichotomy for teachers of

needing to select *either* professional *or* unionised bodies, this proved a thought-provoking question with varied responses.

Two particularly interesting areas of contestation with both existing literature and the teacher unions themselves included respondents' complete rejection of the use of unprotected strikes, regardless of their union-affiliation, and respondents' apparent willingness to adopt performance measurements, which is, ostensibly a long-rejected concept by SADTU.

With respondents of this study clearly rejecting unprotected strike action, SADTU's frequent media-based rhetoric indicating a thirst for strike action (see Section 5.2.5) may not actually represent the views of the majority of its members. While there is clearly evidence to support the statement that SADTU-members participate in strike action, the findings of this study may indicate their lack of desire to actually do so. It is therefore possible that literature depicting this apparently unquenchable thirst for strike action may more accurately reflect the will of individual *leaders* of SADTU, and not the will of the 'average' Gauteng SADTU-member per se. This, along with its historical stance on performance-related measurement, is certainly an area that SADTU leadership might wish to review as part of its efforts to provide appropriate services to its members.

Then, despite many similarities to qualitative literature with regards to the specific complaints raised in this study, it is important to note – again - that despite any reported unhappiness, the vast majority of respondents still valued their unionised status and would not elect to opt out of membership, even if they were given the opportunity. In this regard, while particular complaints are supported, the findings of this study do not appear to be in complete concord with the - often dire - depictions of union-membership in the specific qualitative studies mentioned in this study.

Interestingly, allegations of unfair promotions also failed to return any significant levels of agreement with reports in literature and media, with most respondents indicating little awareness of the practice.

A final, yet significant conclusion of this study, is that the rejection of a strict either/or, dichotomous notion of teacher unionism in South Africa by some authors (see Patillo, 2012, and Govender, 2012) appears to be supported. Similarities across all three unions' respondents indicate that although each union has its own policies and practices, all unions in this study demonstrated varying degrees of both professionalism and unionism. Although it must be added that this apparent agreement has occurred in the context of post-2010, at the end of two protracted teacher union strikes and the establishment of professional development institutes within the unions (De Clercq, 2015), it appears then that literature supporting the professionalising image of unions, *and* literature supporting the

more militant unionised factions are both correct, but perhaps individually fail to reveal a more complete picture. In this regard, one union is capable of both professional and union-type activities, even if it may be to different degrees.

5.4 Scope and Limitations

The scope of this research study intended to identify descriptive data from a population of teachers in public schools around Gauteng, and related to three union-related research questions. It was not, for practical purposes, the intention to obtain data from teachers outside of the central Gauteng region, and so any extrapolation of results should be contained to the central Gauteng region. The study also did not seek to make any predictions, nor attempt to test any hypotheses, since the lack of existing information indicated that descriptive study of this nature was, perhaps more urgently required.

Du Plooy-Cilliers et al (2014) describe limitations as the constraints of a study that fall outside of the researcher's control. According to these authors (Ibid) all studies will include at least some elements over which a researcher has little, or no control. Although the study did need to be conducted within a specific timeframe, the researcher did not encounter significant difficulties in this regard. Budget limitations, due to the data collection method, were also not a major consideration.

Accessibility, did, however, prove somewhat difficult in some cases, with principals of some sampled schools refusing access to the researcher, necessitating selection of alternative schools. This again, while requiring slightly more time, did not impact on the study, since the total population of schools was extensive, and the sample requirement of 270 surveys was exceeded relatively quickly.

Limitations with regards to the use of the survey as an instrument, and with the use of a research assistant to deliver and collect the surveys also exist. While full details of these limits are provided in Chapter 3, it should be noted that all efforts were made to ensure that the surveys were administered and collected as ethically and anonymously as possible through taking particular cautionary measures. Based on the honesty of the responses in the open question of the survey, and on the relative consistency of responses within individual units of analysis, and across the general respondent group, there do not appear to have been any major lapses in these areas.

No major socioeconomic or environmental changes relating to education were evident over the period of data collection (i.e. August and September 2014) and as such, no major shifts in conditions

(du Plooy-Cilliers et al, 2014) were at play that may have affected respondents' completion of the survey instrument. It must, however, be considered, that despite substantial increases and salary adjustments being provided by government in April 2014 (NAPTOSA, 2014), media reports throughout the year still indicated consistent dissatisfaction and the further threat of strikes by SADTU. As such, these environmental factors should be taken into consideration when reading the attitudes and perceptions of the respondents in this study.

In addition to the general context, violent protests in three of the originally sampled school areas, including Bekkersdal, Thembisa and Daveyton over the August/September 2014 period, resulted in the researcher avoiding these schools and sourcing the next most suitable schools on the sample lists. While all schools visited complied fully with the delimitations set by the researcher, the attitudes and perceptions of those teachers in particularly high unrest areas were therefore not obtained, and so this absence potentially reflects an area of neglect in this study.

Despite the limitations indicated in previous chapters, the reasonably uniform responses of teachers within each of the four units of measurement (see Chapters 4 and 5), as well as the relative uniformity in attitudes and perceptions of the key research question areas (see Chapters 4 and 5) suggest that the data integrity is externally valid. Although the myriad limitations cannot be dismissed and should be considered and addressed where possible in any future studies of this topic, the likelihood of substantially different findings given use of the same methods and instrument on another similar sample does not seem likely.

5.5 Recommendations

This study attempted to obtain information from teachers in order to reflect on three main union-related research questions. While most areas of the indicated questions have been dealt with adequately for the purpose of this study, and as such, the goal of contributing to the literature on teacher unions has been met, many of the findings in this report elicit further questions.

Based on the perplexing variety of figures provided from various sources, and contradictions even within SADTU's own claims, an examination of official union membership figures at all unions, but most notably at SADTU, which demonstrated quite significant variances in both its membership weighting and in its gender-split, is recommended. Obtaining official figures relating to membership posed a particular problem for this study, and any future endeavour in this area would therefore benefit from a cooperative relationship with a union official from each represented union.

The suggestion by Bamburger (1999, cited in Redman & Snape: 2006) that unions should work on developing pro-union attitudes that reflect the ideals of solidarity, as opposed to simply relying on union instrumentality, which merely examines the perceived success of desired outcomes such as salary increases and employment conditions, is supported by the findings of this research report. With a large proportion of SADTU-affiliated respondents in this study reflecting a desire to develop professionally and to improve communication within the union, the campaigning approach recommended by Bamburger (Ibid) would perhaps be welcomed by union members.

For possible future study, it may be useful to explore the usefulness of applying Tajfel and Turner's Social Identity Theory (see Lemke and Wilson, 1998, and Bornewasser and Bober, 1987) to the apparently combative approach taken by SADTU with regards to negotiations with the South African government. Through consideration of SADTU's structure, as well as of the individual differentiating characteristics of SADTU members, a more coherent conceptualisation of its intergroup behaviour and leadership may be constructed. Additionally, integrated with findings relating to union member attitudes and perceptions, a theoretical application of this nature would potentially build on the literature relating to perceived legitimacy, stability, and group action in the area of teacher unionism.

Another promising theoretical application, referred to earlier in this report, would include a more comprehensive application of organisational justice theory (Poole, 2007) to the established norms and behaviours of members of the main teacher unions of South Africa. Further exploration into the shared understanding and behaviour of groups, and the individuals within these groups, may offer valuable insight into the rationale for the views and perceptions expressed in this, and other teacher union studies.

For any future iterations of this study, a more generic examination of teachers' attitudes towards performance appraisals should be made since the responses in this study demonstrated a positive attitude to an element of it, but no evaluation of their attitudes to the practice as a whole are possible from the one given question. Possible changes to the method of data collection, and to two of the negatively framed questions on the survey instrument should also be considered prior to any more expansive roll-out.

Given the wealth of data yielded from this study about unionised teachers in Gauteng, broader iterations across other provinces may also prove valuable to provide greater context for the numerous qualitative studies in this area of education research.

Finally, this study also provided a great deal of information that may be of use to provincial and district officials in Gauteng, and also to school management teams. Most notably though, it would serve as useful resource to union officials in Gauteng in their approach and dealings with members.

Careful reflection on teacher attitudes within the units of analysis by union officials, and considered action on areas of both approval and concern may alleviate much of the apparent member dissatisfaction reported in both qualitative and quantitative literature, and help individual unions to evolve into progressive, professional institutions that are still able to look after the 'bread-and-butter' issues of unionism.

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Addendum A

Survey Instrument

Research Survey – Teacher Unions 2014

This questionnaire includes three sections with short, closed questions. It should take you approximately 15 to 20 minutes to complete. There is also a space to add any comments should you wish to do so at the end of the survey.

This survey is completely anonymous. You cannot be identified once you have enclosed it in the self-sealing envelope and given it to the researcher.

Section A: Biographic and Professional Information

For this section, please read the questions and possible responses carefully and answer them truthfully.

Place a clear X over one circle next to the most appropriate response for each question.

1. Please indicate your gender: *(select only one)*

1. ○ Male

2. ○ Female

2. Which category below includes your age? *(select only one)*

1. ○ 21 or younger

2. ○ 22 – 29

3. ○ 30 – 39

4. ○ 40 – 49

5. ○ 50 – 59

6. ○ 60 +

3. What is your official position at your school? *(select only one)*

1. ○ Teacher

2. ○ Head of Department

3. ○ Vice Principal

4. ○ Principal

5. ○ Other (please specify) _____

4. How many years of teaching experience do you have in total? *(select only one)*

1. ○ Less than 1 year

2. ○ 1 – 3 years

3. ○ 4 – 9 years

4. ○ 10 – 19 years

5. ○ More than 20 years

5. Please indicate your highest academic qualification from the list below: *(select only one)*

1. ○ 2-year certificate in teacher education (M+2)
2. ○ National Diploma
3. ○ Advanced Diploma
4. ○ Education Degree (BEd)
5. ○ Bachelor's Degree plus postgraduate Teaching Diploma
6. ○ Honour's Degree
7. ○ Honour's Degree plus Teaching Diploma
8. ○ Master's Degree
9. ○ Master's Degree plus Teaching Diploma
10. ○ Doctoral Degree
11. ○ Doctoral Degree plus Teaching Diploma
12. ○ Other (please specify) _____

6. Which teacher union do you belong to? *(select only one)*

1. ○ SADTU (South African Democratic Teachers' Union)
2. ○ NUE (National Union of Educators)
3. ○ NAPTOSA (National Professional Teachers' Organisation of South Africa)
4. ○ SAOU (Suid Afrikanse Onderwyserunie)
5. ○ NATU (National Teachers' Union)
6. ○ MESHAWU (Municipal, Education, State, Health and Allied Workers' Union)
7. ○ Other (Please specify) _____
8. ○ None (I pay a compulsory fee but am not affiliated to a union)

Section B: Range Statement Questions – My Union

In this section, you are asked to respond to given statements about *your* union using a sliding scale of 1 – 5. Answering 1 means that you strongly agree with the statement, while answering 5 means that you strongly disagree with it. For each of the statements below, please indicate the box that *most applies* to you by writing a large and clear X over it.

7. My union's monthly fee is affordable for me: *(select only one)*

1. **Strongly agree**	2. Somewhat agree	3. Unsure	4. Somewhat disagree	5. Strongly disagree

8. My union gives me value for money: ***(select only one)***

1. **Strongly agree**	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

9. My union protects me from unfair treatment in the workplace: ***(select only one)***

1. **Strongly agree**	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

10. I am happy with the way my union communicates with me: ***(select only one)***

1. **Strongly agree**	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

11. My union involves me when it needs to make decisions about education issues that affect me: ***(select only one)***

1. **Strongly agree**	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

12. My union negotiates pay and teacher benefits in ways that I agree with: ***(select only one)***

1. **Strongly agree**	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

13. I support the use of <u>protected</u> (legal) teacher strikes to see that union demands are met: ***(select only one)***

1. **Strongly agree**	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

14. I support the use of <u>unprotected</u> (illegal) teacher strikes to see that union demands are met: ***(select only one)***

1. **Strongly agree**	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

15.My union plays a positive role in developing education policy in South Africa: *(select only one)*

1. Strongly agree	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

16.My union works to improve the quality of education for learners: *(select only one)*

1. Strongly agree	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

17.My union emphasises teacher development as a priority: *(select only one)*

1. Strongly agree	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

18.My union provides useful teacher development workshops and/or other training and learning opportunities for teachers: *(select only one)*

1. Strongly agree	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

19.I would welcome efforts by my union to set standards for evaluating teacher performance: *(select only one)*

1. Strongly agree	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

20.My union would provide me with legal representation or advice if I were involved in disciplinary action: *(select only one)*

1. Strongly agree	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

21.My union assists its members in getting promotions: *(select only one)*

1. Strongly agree	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

22.I would not be given salary increases without the negotiations of my union: ***(select only one)***

1. **Strongly agree**	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

23.I am proud to be a member of my union: ***(select only one)***

1. **Strongly agree**	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

24.I would prefer not to belong to any union at all: ***(select only one)***

1. **Strongly agree**	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

Section C: Range Statement Questions – Teacher Unions in General

The final set of statements asks for your opinion and view of teacher unions *in general* in South Africa. As with the previous set of questions, answering 1 means that you strongly agree with the statement, while answering 5 means that you strongly disagree with it. For each of the statements below, please indicate the box that *most applies to you* by writing a large and clear X over it.

25.Teacher unions in South Africa are more focused on teacher-benefits than on teacher development: ***(select only one)***

1. **Strongly agree**	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

26.Without strong teacher unions and federations, teachers would be treated unfairly by their employers: ***(select only one)***

1. **Strongly agree**	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

27.The professional image of teachers is damaged by <u>unprotected</u> strikes: *(select only one)*

1. **Strongly agree**	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

28.Some unions use their influence to unfairly promote their members: *(select only one)*

1. **Strongly agree**	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

29.Teachers should not be forced to belong to a union: *(select only one)*

1. **Strongly agree**	2. Somewhat agree	3. Don't know	4. Somewhat disagree	5. Strongly disagree

Thank you

Thank you so much for answering this questionnaire. Should you wish to add any comments regarding either your union or other teacher unions in South Africa, please use the space below to do so. Please remember that this is an anonymous survey so your name will never be revealed.

30. Your comments:

Addendum B

Thematic Points and Related Coding

Theme & Question/Statement	Coding
Demographics	
Please indicate your gender	A01
Which category below includes your age?	A02
What is your official position at your school?	A03
How many years of teaching experience do you have (in total)?	A04
Please indicate your highest academic qualification	A05
Which teacher union do you belong to?	A06
Union fees	
My union's monthly fee is affordable for me	B07
My union gives me value for money	B08
Union benefits	
My union protects me from unfair treatment in the workplace	B09
My union would provide me with legal representation or advice if I were involved in disciplinary action	B20
My union assists its members in getting promotions	B21
I would not be given salary increases without the negotiations of my union	B22
Teacher unions in South Africa are more focused on teacher-benefits than on teacher development.	C25
Without strong teacher unions and federations, teachers would be treated unfairly by their employers.	C26
Some unions use their influence to unfairly promote their members	C28
Membership Perceptions	
I am happy with the way my union communicates with me	B10
My union involves me when it needs to make decisions about education issues that affect me	B11
My union negotiates pay and teacher benefits in ways that I agree with	B12
I am proud to be a member of my union	B23
I would prefer not to belong to any union at all	B24
Teachers should not be forced to belong to a union	C29
Strike action	
I support the use of protected (legal) teacher strikes to see that union demands are met.	B13
I support the use of unprotected (illegal) teacher strikes to see that union demands are met.	B14
The professional image of teachers is damaged by unprotected strikes	C27

Teaching and Learning	
My union plays a positive role in developing education policy in South Africa	B15
My union works to improve the quality of education for learners	B16
My union emphasises teacher development as a priority	B17
My union provides useful teacher development workshops and/or other training and learning opportunities for teachers	B18
I would welcome efforts by my union to set standards for evaluating teacher performance	B19

Open Question Themes	**Coding**
Communication – good (excellent workshops)	OQCG1
Communication – good (willingness to come to schools)	OQCG2
Communication – good (professional)	OQCG3
Communication – poor (don't deal with things confidentially)	OQCP1
Communication – poor (lack of consultation)	OQCP2
Communication – poor (in meetings)	OQCP4
Communication – poor (no info on unions given to non-unionised members)	OQCP5
Communication – poor (not delivering on promises)	OQCP6
Communication – poor (should use technology)	OQCP7
Administration – poor (frustration with admin processes or requests)	OQAP1
Lack of assistance – poor benefits	OQLA1
Lack of assistance – gvt doesn't care about teachers – union not helping	OQLA2
Lack of assistance – job insecurity re temporary contracts	OQLA3
Lack of assistance - salary improvement	OQLA4
Lack of assistance – working higher post, but not promoted/paid more	OQLA5
Lack of assistance - workload	OQLA6
Need more of – workshops for dealing with discipline issues in schools	OQNM1
Need more of – employer and union collaborating to improve education	OQNM2
Need more of - monitoring of new curriculum policies, materials etc.	OQNM3
Need more of - teacher development and professionalism	OQNM4
Politics – compromises moral authority of union	OQPO1
Politics - corruption	OQPO2
Politics – militancy reduces union reputation	OQPO3
Politics – racial divide in unions	OQPO4
Politics – unions should be apolitical	OQPO6
School preventing union-activities	OQSP1
Strikes – don't need unions, just strikes	OQST1
Strikes – need to stop	OQST2
Strikes – no point if they don't meet demands	OQST4
Strikes – no work no pay	OQST5
Unions are important as an institution	OQUI1
Union provides good support with teacher training	OQUN1
Union problems – not about education or children	OQUP1
Union problems – over empowered so leads to abuse of power	OQUP2
Union problems - protection for incompetent teachers	OQUP3
Union problems – reputational damage to teachers	OQUP4
Union problems - unfair promotions	OQUP5
Union problems – unfairness of deduction for non-unionised members	OQUP6

Union problems – unions are money-making businesses (forgotten their duty)	OQUP7
Union problems - unions not consolidated and therefore not strong	OQUP8
Union problems – useless workshops	OQUP9
Viva SADTU!	OQVS1
Not union-related – positive comment on questionnaire	OQNU1

Addendum C

Information sheet for principals

REQUEST TO DELIVER & COLLECT RESEARCH SURVEYS 1 September 2014

Dear XXXXXXXXX

I am currently engaged in collecting data for a research study in the School of Education at the University of the Witwatersrand. This particular study involves much-needed quantitative research on the way that teachers in central Gauteng see teacher unions.

The Gauteng Department of Education has given its permission to conduct research with your teaching staff as respondents, and we would really value your assistance in this regard.

The data collection will involve a personal visit by me to your school in order to deliver 20 surveys in uniquely coded envelopes. I would then request that you ask for at least 15 volunteer staff to complete the survey. This should be completed without assistance from anyone else and are completely anonymous. The survey itself should take between 5 to 10 minutes to complete.

I will return to your offices to collect the completed surveys as per arrangement. This research should not impact significantly on your or your staff's time and should not detract from any teaching-time.

Teaching staff who participate in this research will not be disadvantaged in any way. Respondents should be assured that they may withdraw their permission at any time without any penalty (they will simply use their codes to do so).

Although there are no undue physical or psychological risks expected from participation in this study, the topic of unions is sometimes contentious and some staff may not wish to participate. As such, only volunteers should be sought. Please also note that the respondents will not be paid for this study due to ethical considerations.

Finally, please be assured again that the names of the research respondents and the identity of the school will be kept confidential at all times and in all academic writing about the study. Your school's privacy will also be maintained in all published, spoken and written data resulting from the study. Research data itself will be destroyed five (5) years after completion of the project to ensure this.

Please do not hesitate to contact me should you require any further information on this research project, or for a copy of the survey should you wish to view this first. Thank you so much for your assistance.

Yours sincerely

CHERYL SIEWIERSKI (Researcher)
csiewierski@iie.ac.za or 082 3724670 or 011 6768000

Addendum D

Information sheet for teachers

INFORMATION SHEET FOR TEACHERS 1 September 2014

Dear Teacher,

My name is Cheryl Siewierski and I am conducting research in the School of Education at the University of the Witwatersrand. This research is much-needed research on what you, as teachers in central Gauteng, think about teacher unions.

I would like to invite you to participate in this research by completing a short, anonymous survey questionnaire regarding your perceptions and attitudes of teacher unions in this country.

Should you agree to participate, I have provided you with a uniquely coded self-sealing envelope and a survey questionnaire that should be completed without assistance or input from anyone else. The survey should only take you between 5 to 15 minutes to complete. Once you have filled in the boxes on the survey, please make sure that you keep record of the unique code on your survey, and that you seal the envelope before submitting it back to the person collecting them at your school.

Should you decide, at any time, to withdraw from the research, you may do so by contacting me at the email address below and providing me with the unique code that you found in your survey envelope. I will then destroy your completed survey.

Although there are no undue physical or psychological risks inherent to this study, the topic of unions is sometimes contentious and certain colleagues may attempt to intimidate you should you wish to participate. Please do not participate in this research if you feel that your life or social well-being is in any way jeopardised. This is a voluntary study and there are no penalties for non-participation.

Your name and the identity of your school will be kept confidential throughout research and writing of this study. Your individual privacy will also be maintained in all published, spoken and written data resulting from the research. The physical copy of your completed survey will be destroyed 5 years after completion of this project.

Please feel free to approach me if you require any further information. I am more than happy to answer any questions you may have.

Thank you so much for your assistance.

Yours sincerely

CHERYL SIEWIERSKI
csiewierski@iie.ac.za or 082 3724670 or 011 6768000