

# **Teacher Policies and Practices to Address EFA**

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## Abbreviations and Acronyms

ABET	Adult Basic Education and Training
ACE	Advanced Certificate of Education
ADP	Accelerated Development Plan
AGEI	African Girls' Education Initiative
AIDS	Acquired Immune Deficiency Syndrome
AIDS	Acquired Immune Deficiency Syndrome
ANC	African National Congress
APRM	African Peer Review Mechanism
ATC	Advanced Technical Certificate
BECE	Basic Education Certificate Examination
BEd	Bachelor of Education
BTVET	Business, Technical, and Vocational Education and Training
C2005	Curriculum 2005
CA	Continuous Assessment
CEPD	Centre for Education Policy Development
CET	Centre for Educational Technology
CHE	Council for Higher Education
CoE	Colleges of Education
CPTD	Continuing Professional Teacher Development
DACF	District Assemblies Common Fund
DfID	Department for International Development (UK)
DoE	Department of Education
EC	Eastern Cape Province
EFA	Education for All
EIU	Economist Intelligence Unit
EMIS	Education Management Information System
ESA	Education Standards Agency
ESAR	Education Sector Annual Review
ESC	Education Service Commission
ESIP	Education Strategic Investment Plan
ESP	Education Strategic Plan
ESSP	Education Strategic Plan
ETF	Education Trust Fund
FCT	Federal Capital Territory
FCUBE	Free Compulsory Universal Basic Education
FET	Further Education and Training
FME	Federal Ministry of Education
FRN	Federal Republic of Nigeria
FS	Free State Province
GAC	Ghana Aids Commission
GAR	Gross Attendance Ratio
GDP	Gross Domestic Product
GER	Gross Enrolment Rate
GER	Gross Enrolment Ratio
GES	Ghana Education Service
GET	General Education and Training
GETfund	Ghana Education Trust Fund
GLSS	Ghana Living Standards Survey
GMR	Global Monitoring Report
GNAT	Ghana National Association of Teachers
GNP	Gross National Product

GoG	Government of Ghana
GoN	Government of Nigeria
GoSA	Government of South Africa
GPI	Gender Parity Index
GPRS	Growth and Poverty Reduction Strategy
GSS	Ghana Statistical Service
GT	Gauteng Province
HDI	Human Development Index
HE	Higher Education
HEI	Higher Education Institution
HIPC	Heavily Indebted Poor Countries
HIV	Human Immunodeficiency Virus
HSRC	Human Sciences Research Council
ICT	Information and Communication Technology
INSET	In-Service Education of Teachers
IPET	Initial Professional Education of Teachers
IQMS	Integrated Quality Management System
ISTT	In-Service Teacher Training
JAMB	Joint Admissions Matriculation Board
JSS	Junior Secondary School
KG	Kindergarten
KZN	KwaZulu-Natal Province
MDG	Millennium Development Goal
MDGs	Millennium Development Goals
MLA	Monitoring Learning Achievement
MoE	Ministry/Minister of Education
MoES	Ministry of Education and Sports
MoESS	Ministry of Education, Science and Sports
MoFEP	Ministry of Finance and Economic Planning
MoFPED	Ministry of Finance, Planning and Economic Development
MP	Mpumalanga Province
MUST	Mbarara University of Science and Technology
NAB	National Accreditation Board
NABPTEX	National Board for Profession and Technician Examinations
NACVET	National Council for Vocational Education and Training
NAPE	National Assessment of Progress in Education
NAR	Net Attendance Ratio
NC	Northern Cape Province
NCDC	National Curriculum Development Centre
NCE	Nigerian Certificate in Education
NCS	National Curriculum Statement
NCTE	National Council for Tertiary Education
NDHS	National Demographic Health Survey
NEEDU	National Education Evaluation Development Unit
NER	Net Enrolment Ratio
NFED	Non-Formal Education Division
NGEP	Northern Girls Education Project
NGO	Non-Governmental Organisation
NPEC	National Primary Education Commission
NQF	National Qualifications Framework
NRM	National Resistance Movement
NTC	National Teaching Council
NTI	National Teachers' Institute
NW	North West Province
OBE	Outcomes-Based Education
ODA	Official Development Assistance
ODL	Open Distance Learning
OECD	Organisation for Economic Co-operation and Development

PCR	Pupil-Classroom Ratio
PD	Professional Development
PDE	Provincial Department of Education
PDTMP	Primary Teacher Development and Management Plan
PGCE	Post-Graduate Certificate in Education
PIRLS	Progress in International Reading Literacy Study
PLE	Primary Leaving Examination
PSTE	Pre-service teacher education
PTC	Primary Teacher College
PTR	Pupil-Teacher Ratio
SACE	South African Council for Educators
SACMEQ	Southern Africa Consortium for Monitoring Educational Quality
SAECMEQ	Southern and Eastern Africa Consortium for Monitoring Educational Quality
SADTU	South African Democratic Teachers' Union
SAGEN	Strategy for Acceleration of Girls' Education in Nigeria
SAQA	South African Qualifications Authority
SCE	Senior Certificate Examination
SFAI	School Fee Abolition Initiative
SGB	School Governing Body
SPEB	State Primary Education Board
SSA	Sub-Saharan Africa
SSS	Senior Secondary School
TED	Teacher Education Division (GES)
TIMSS	Trends in International Mathematics and Science Study
TPC	Thematic Primary Curriculum
TTC	Teacher Training Colleges
TVED	Technical Vocational Education Division (GES)
UACE	Uganda Advanced Certificate of Education
UBE	Universal Basic Education
UBEB	Universal Primary Education Board
UCE	Uganda Certificate of Education
UIS	UNESCO Institute for Statistics
UNDAF	United Nations Development Assistance Framework
UNDP	United Nations Development Programme
UNEB	Uganda National Examinations Board
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UPE	Universal Primary Education
USE	Universal Secondary Education
UTDBE	Untrained Teachers Diploma in Basic Education
WAEC	West Africa Examination Council
WC	Western Cape Province



# **1. Chapter one: Case Study of Ghana**

## **Introduction**

Shortly after independence, primary education has been declared compulsory in Ghana, through the Education Act of 1961, and the country has since then been aiming to develop an education system that is accessible and available to all, as enshrined in the Constitution. As part of its agenda for education the Government of Ghana has been introducing a number of education reforms which have successfully managed to expand educational access. Yet, wide regional educational disparities and quality education gaps persist. While in the past policies on teacher education have been somehow fragmented, reforming and restructuring the teacher educational system has now become central to sustain the gains of the reforms and to increase quality education if to realize Ghana's aspirations to become a middle-income country by 2015. This case study focuses on Ghana's teacher education policies and their impact on improving quality, access and equity in Ghanaian education.

### **1.1. Methodology**

#### **1.1.1 Aim and rationale for Ghana**

The aim of this case study is to provide an analysis of the efficiency and effectiveness of policies and practices to address the teacher gap for Education for All (EFA) in Ghana. Specifically, this study reviews Ghana teacher education policies and their impact on access, quality and equity in education.

The Ghana case forms an interesting experience as the country is considered to have a well established education system and, according to the latest Ghana Millennium Development Goals (MDGs) Report, it is on track to achieve the MDGs 2 and 3 on Universal Primary Education (UPE) and gender parity respectively by 2015 (NDPC/UNDP, 2010). In order to address the teacher gap to reach these goals it is estimated that Ghana needs to expand its teaching force annually by 1.1% (UIS, 2010). This places Ghana as one of the few countries with a moderate teacher gap in a region facing critical qualified teacher shortages. Furthermore it is generally recognised that despite political changes education has received high priority in the Government of Ghana (GoG) agenda, and education policies have received a strong support by the international donor community.

Ghana has actually extended the goal of UPE placing Universal Basic Education (UBE) as a national priority. However, the country still experiences significant challenges including wide regional imbalances, gender gaps and inefficiencies in teacher development, deployment, retention and equity in the profession. These need to be addressed if to sustain the gains from education expansion and 'to develop reflective and proficient practitioners capable of providing quality education for all Ghanaian children', as expressed in the latest country vision of teacher education (MoE, 2010:3).

#### **1.1.2 Data collection and analysis**

This desk-based study focuses on Ghana education policies and the analysis was based on an extensive review of literature that included:

1. Government publications related to the education sector in general and teacher education policies and programmes in particular, including country reports, education plans, education sector annual reviews and other Government related publications. These were retrieved online through the UNESCO website, the Ghana Statistical Service (GSS) and scholarly searches.
2. Published articles, reports, journals and publications on teacher education in Ghana. These were found by undertaking an in-depth search of relevant academic journals in the fields of international education, teacher education and development.
3. Development agencies studies on education in Ghana, reports on education projects and teacher development, including project evaluations.

Since the 1950s there have been a number of educational reforms in Ghana but the study hereby presented focus particularly in policies and programmes introduced after the 1987 Educational Reform Programme and the 1997 Basic Education Reforms (the FCUBE programme) that had particular influence in providing more and better qualified teachers, for which is possible to assess results. It will also touch upon some teacher development policies that have been recently endorsed under the 2007 Education Reform for which impact can not yet be observed, to be followed through further research.

### **1.1.3 Study Limitations**

While every effort has been made to provide a comprehensive and robust analysis, the following limitations are acknowledged:

1. Ghana EMIS, described as an example of best practice for decentralised planning and budgeting at the level of planning and design (Trucano, 2006), was not available for consultation. This was a significant limitation to track progress and effectively assess impact in access, quality and equity. When possible secondary data was used.
2. Limited availability of Ghana's educational reform documents. Recent information and reports from the MoE were not available and the Ministry's website was under maintenance during the whole duration of research. In addition, there is limited research looking specifically at the teaching profession in the country (Osei, 2006).
3. As Ghana has implemented numerous education reforms it is difficult to associate outcomes and attribute change in the education system to a specific teacher policy or reform. Still, policies and programs regarding teacher development have been somehow fragmented and incomplete and not always evidently documented. This could be linked to the fact that no single overarching teacher education policy was in place for the period of analysis. The Ghana Education Service (GES) is now in the process of developing a Pre-tertiary Teacher Professional Development and Management policy framework (MoE, 2010).
4. As this is a desk-based review, the study is limited to a literature review and is not supplemented by field studies, questionnaires or interviews. Information has been triangulated by comparing different sources (governmental, donors, researchers, etc.) and consulting education key experts.
5. Ghana has been characterized by regional disparities in education since pre-colonial times. The impact of national policies needs to be assessed in light of the different regional results but breakdown of data is not always available. This should be taken into account into the interpretations of results, in particular the impact in the deprived districts, as well as to be considered in further research.

## **1.2. The Education System in Ghana**

### **1.2.1. The country socio-economic context**

With an extensive history, particularly in trade and slavery, the Republic of Ghana was the first country in sub-Saharan Africa to achieve independence from Britain in 1957. Today Ghana has a multiparty democratic system and a good reputation on governance<sup>1</sup>, often being considered a safe heaven in the West Africa Region, a promoter of peace and a major supporter of regional integration. It was one of the first countries to join the African Peer Review Mechanism (APRM).

The country is divided in ten administrative regions: Northern, Upper East and Upper West are usually referred as the northern part of the country; the south has seven regions: Ashanti, Brong-Ahafo, Central,

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<sup>1</sup> Ghana reached one of the top ten highest overall scores in the 2010 Ibrahim Index of African Governance, ranking 7 out of the 53 countries and scoring 65 out of 100, above Africa's average for governance quality at 49 (Mo Ibrahim Foundation, 2010).

Eastern, Greater Accra, Volta and Western. Most natural resources are concentrated in the southern part and since pre-colonial times there has been an unequal distribution of programmes and projects favouring this area (EIU, 2008), a disparity that successive Governments have been trying to address.

The population of Ghana is estimated to reach 24,333 million in 2010<sup>2</sup>, with an average decreasing population growth rate around 2% for the period 2010-2015 (UN Population Division Database, 2010) and mostly concentrated in Ashanti and Greater Accra (EIU, 2008). As of 2007, life expectancy is estimated at 56 years for men and 57 for women (WB, 2010). According to the data from the national Ghana Living Standards Survey Fifth Round (GLSS 5) children under 15 years represent about 40% of the population hence a high dependency ratio, and females constitute 51.5% of the population (GSS, 2008). Akans represent approximately half of the Ghanaian population, followed by the Mole-Dagbon and the Ewe (EIU, 2008). Christianity, Islam and other African traditional belief systems are the main religions in the country.

With the political and economical instability that characterized the country in the 80s, the Government resorted to seek international assistance from the World Bank (WB) and the International Monetary Fund (IMF) to deal with the economic crisis. Since mid eighties the country has experienced renewed growth registering a 5.6% average annual GDP growth rate between 2000 and 2008 (WB, 2010) and has been quite stable. According to IMF estimates, real GDP grew by 6.4% in 2006 and 6.3% in 2007, the highest growth rates achieved in 20 years (EIU, 2008) but with a widening fiscal deficit, particularly with the pressure of demonstrating progress during election years.

The GoG had an overall budget deficit of 7.8% of GDP in 2006, 9% of GDP in 2007 (EIU, 2008) and it is expected to reach 10.2% of GDP in 2010 (MoFEP, 2010). Furthermore, Ghana economy remains highly dependent on the main commodities: cocoa, gold and oil (EIU, 2008). Following the discovery of offshore oil fields in Ghana territorial waters in 2007, expected to bring significant inflows in the future, the GoG has been taken efforts to prepare for the oil boom and avoid the so-called 'oil curse'. With the domestic energy crisis in 2006 and the global economic and food crisis, Ghana's public debt position has deteriorated in the last years moving from 41,4% in 2006 as percentage of GDP to 55,2% in 2008 (NDPC/UNDP, 2010).

The majority of the labour force works in the agricultural sector (55.8%), followed by trading (15.2%) and manufacturing (10.9%) (GSS, 2008). There is also a growing informal sector with small traders and artisans, technicians and businessmen (NDPC/UNDP, 2010). In 2000 the official unemployment rate was 11% but it is now estimated to be much higher (EIU, 2008).

Ghana commitment towards achieving the MDGs has been expressed in the 2003 Growth and Poverty Reduction Strategy (GPRS I). While reiterating these objectives, its successor, the 2006-2009 GPRS II, establishes the goal to accelerate economic growth to achieve a middle-income status, driven by knowledgeable, well-trained and healthy human resources (WB and GoG, 2006). In this framework there is a recognition and emphasis on the central role of human resources, including teachers, to reach Ghana's developmental objectives.

In the last decade Ghana has made progress towards the achievement of the MDGs. Data from the GLSS 5 and the 2010 World Development Report indicate a significant reduction of the population estimated at living below the national poverty line: 28,5% in 2006 compared to 39,5% in 1999 (GSS, 2008; WB, 2010). Yet, poverty remains very high in the northern regions, particularly in Upper West (GSS, 2008). The Human Development Index (HDI) has also improved significantly in the last ten years, above the average of sub-Saharan Africa, with 0.467 for 2010 compared to 0.431 for 2000, ranking 130 out of 169 countries (UNDP, 2010). Yet, the GINI coefficient stands at 42.8 (UNDP, 2009), representing an increase in income inequality when compared to 40.7 for 1999 (UNDP, 2002). Moreover, when using the inequality-adjusted HDI recently adopted by the latest HDR, Ghana goes down to 0.349, loosing 25% due to multidimensional inequality (UNDP, 2010). The adult literacy rate for Ghana recorded between 2000-2007 is 65%, 72% for males and 58% for females (UNESCO, 2010). Other education indicators are presented in Section 2.4 of this case study.

According to the latest country progress report to UNGASS, HIV prevalence has been declining in the last years, estimated at 1.9% for 2009, with 40-44 year groups presenting the highest rates (4.0%) (GAC, 2010).

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<sup>2</sup> At the time of the research the GSS was conducting the 2010 population and housing census.

In 2009 it was estimated there were 240,802 adults and children living with HIV/AIDS and 64,978 adults and 6010 children in need of ART (GAC, 2010). Prevention, care, treatment and support activities have been scaled-up and access to services has increased but still lagging behind the needs.

Recent governments have also expanded social expenditure rehabilitating north-south roads, extending the national electricity grid, health care services and increased expenditure on education (APRM, 2005; EIU, 2008). However, these reforms have not yet been translated in terms of public goods access for the most vulnerable nor have shifted gender, regional and urban/rural disparities. In particular, high levels of poverty persist in the three Northern regions and 70% of people whose income is below the poverty line are in the Savannah areas (NDPC/UNDP, 2010).

A number of challenges slowing down progress have been identified in the 2005 APRM assessment conducted in Ghana: capacity constraints; impediments to gender equity; corruption; weak decentralisation process; land issues, chieftaincy, unemployment and external dependency, hampering participation, accountability and transparency in social service delivery (APRM, 2005).

The heavy reliance on external resources for financing government development expenditure also implies that western donors have significant influence in the policies and development programs implemented in Ghana. The United States have a very close relationship with the country, a link that has prevailed since slavery times (Agbemabiese, 2007) and international financial institutions have particularly influenced the country's educational reform (Dull, 2006). Ghana is part of the top 10 Official Development Assistance (ODA) recipients in Africa, receiving approximately 3% of all ODA recipients (1,207 M US\$ in 2008), similar to Kenya and Cameroon (OECD, 2010).

When considering the education sector, in recent years total ODA to education has significantly decreased from 371 M US\$ in 2006 to 188 M US\$ in 2007 with the majority of funds being channelled for primary education support (67% in 2007 compared to 51% in 2006) (OECD, 2010). Government has expressed the desire to reduce basic education dependency on donor support (GoG, 2002). The relative share of education in total ODA has also decreased from 24% to 11% in 2007 compared to the previous year, slightly above the average for Sub-Saharan Africa (UNESCO, 2010). In light of fiscal pressure, the latest Global Monitoring Report (GMR) alerts that Ghana is planning to cut education spending as a share of GDP and total expenditure (UNESCO, 2010). In 2003, it was estimated that the GoG provided 91% of education financing, with the majority allocated to teachers' salaries (MoE, 2003). On top of GoG resources, other major sources of funding for the MoE include donor support, the Ghana Education Trust Fund (GETFund), the Heavily Indebted Poor Countries (HIPC) relief and the District Assemblies Common Fund (DACF). In 2005 these accounted for more than 35% of funding for education (MoE, 2006).

Since independence, and in particular after the periods of economic decline in the 1980s, Ghana has made major progress in the attainment and consolidation of growth. The successive government policies together with significant development assistance have led to progress in socio-economic terms. However, strong regional and gender disparities persist and, as highlighted in the latest MDGs Report for the country (UN, 2010), more efforts need to be put in place to ensure equitable growth and sustainable human development towards the attainment of a middle income country status by 2015. The availability of human capital is then central and education has become a priority area for the GoG (Sackey, 2008) in order to reach the country's development goals.

### **1.2.2. Structure of the Education System**

For the main period that this study reports upon, this is, since the Education Reform of 1987 and prior to the latest Education Reform of 2007, the education system in Ghana has been composed by a 6-3-3-4 system of education. The system includes 6 years of primary education, as the large majority of the Sub-Saharan countries, and 6 years of secondary education: 3 years in junior secondary school (JSS) and 3 years in senior secondary school (SSS). Once basic education (primary education and JSS) is completed, in order to move to SSS students need to pass the national Basic Education Certificate Examination (BECE). Basic education is tuition free and mandatory for the age group 6-15 years old.

At tertiary level, the Government offers 4 years of university education and other possibilities offered are 2-3 years diploma at polytechnics and Teacher Training Colleges (TTC), which have been upgraded to

diploma awarding institutions in 2004 (Agbeko, 2007). After JSS and during SSS other options available include post-secondary, technical and vocational education (Mettle-Nunoo & Hilditch, 2000). With the 2007 Education Reform, basic education has been expanded to officially include 2 years of kindergarten, beginning at age four, and upper secondary school has been expanded to four years, resulting on a 2-6-3-4-4 system of education, significantly increasing GoG expenditure.

Within the education system, the proportion of private schools is relatively low compared with the public education system. Yet, for kindergarten and tertiary levels private offer is significant and on the rise, although it remains mainly an urban phenomenon (Akyeampong et al., 2007). In 2001/2002 Ghana had 9,634 kindergartens, 15,285 primary schools, 8,092 secondary schools and 23 TVET (MoE, 2003). For the same period there were 3.66 Million learners and 137,881 educators (MoE, 2003) in the public education system. More recent data on the number of establishments per educational level is presented in Section 2.4.

At the tertiary level, there are 5 public universities and entrance requirements involve an examination conducted by the West African Examination Council (WAEC). There are 12 private universities regulated by the National Accreditation Board (NAB).

Within the Ministry of Education (MoE) a number of agencies have delegated education responsibilities. The Ghana Education Service (GES) is the main responsible for pre-university education service provision, including the Teacher Education Division (TED) and technical and vocational training institutes, managing approximately 80% of the education expenditure (MoE, 2003). Within the GES a specific Girl Education Unit has been created to promote the support, enrolment, retention and motivation of the girl child (Mettle-Nunoo & Hilditch, 2000). The National Council on Tertiary Education (NCTE), the National Council for Vocational Education and Training (NACVET) and the Non-Formal Education Division (NFED) are also responsible for education delivery in their respective areas. The NAB and the National Board for Profession and Technician Examinations (NABPTEX) are responsible for external evaluations. Under the 2008 Education Act (see Section 2.3) the creation of a National Teaching Council (NTC) is foreseen, responsible for setting professional standards and code of practice for professional development, registration and licensing of teachers.

The GES is represented in all the 10 regions (Regional Education Office) and 138 districts of Ghana (each with a District Education Office) and a number of institutions have been created at community level (School Management Committees; Parent-Teacher Associations) and district level (District Oversight Committees for Education) all coordinated by the District Directorate of Education under the GES (GoG, 2007).

In parallel to the government decentralisation reform programme, a decentralisation process is taking place in the education sector and there seems to be a certain degree of independence at secondary levels. However, the MoE recognizes the limited autonomy of local government levels on key aspects such as teacher management, remuneration, teachers' accommodation and related infrastructure (GoG, 2007). A review of the Ghanaian situation regarding the level of participation in the education policy found that further progress is needed to ensure that districts and schools own their programmes and budgets in order to achieve policy goals and objectives (Mettle-Nunoo & Hilditch, 2000). Despite the ongoing decentralisation, the state is clearly the one controlling the education policies and decision making processes, a pattern which has been observed since independence (Agbemabiese, 2007).

In terms of representation of teachers' interests, the main organisation in the country is the Ghana National Association of Teachers (GNAT), formed in 1962 (Agbemabiese, 2007). The GNAT is a service organisation representing teachers at the pre-tertiary level, drawing its members from public and private primary, junior and secondary schools, teacher training colleges, technical institutes and offices of educational administration units, while aiming at improving conditions of service for all its members.

Other actors in the education sector include the Ministry of Local Government and Rural Development, the district assemblies, religious bodies, development partners, and service providers which participate through the provision of financial resources to the education sector, the participation in policy and planning processes and delivery of educational services (WB, 2009). Donors have had significant influence in Ghana's Education Reforms and their implementation, in particular since the initiation of the FCUBE

programme<sup>3</sup> (Okugawa, 2010). A review of donor policy in the education sector since 1987 in Ghana found that conflicting aid policies among donors and lack of coordination have limited the effectiveness of aid provision (see Mettle-Nunoo & Hilditch, 2000). This echoes the results of a recent study exploring the perception of international assistance under the FCUBE programme, as donors failed to coordinate and harmonise their aid delivery approaches (Okugawa, 2010). Research has also found a low level of regular community participation and involvement in education policy making and implementation (Mettle-Nunoo & Hilditch, 2000). Indeed in the documents reviewed within this study it has not been clear how teachers and schools have been involved in decision making processes and policies that concern them.

### 1.2.3. Education Policy Frameworks

Since the 1950s there have been several educational reforms in Ghana, expressing the high commitment of the GoG to educational development over the years, in particular to achieve the goal of Universal Primary Education (UPE) which in Ghana has been an ambition extended to Universal Basic Education (UBE). Significant education policies can be identified back to the 1951 Accelerated Development Plan (ADP) for Education (Agbeko, 2007) to provide education expansion at all levels. After independence in 1957, Ghana's educational system, then modelled on the British system, went through a number of other reforms (Agbemabiese, 2007). The Education Act of 1961 sets the ground for the policies to ensure free primary education to all Ghanaian children establishing the post-independence legal basis for compulsory primary and middle school education for all children (Amedahe & Chandramohan, 2009). The Dzobo Reforms of 1975 introduced a new thinking about Ghana's education system and were the first to recommend the JSS concept (Agbemabiese, 2007). The Education Reforms of 1987 and 1995 further contributed to educational transformation and to increase access to schooling as further described below. The most recent Education Reform of 2007 introduced major changes in the teacher development system.

When considering the education developments of the last two decades, a number of educational policies and reforms have had direct or indirect implications for teacher development including:

1. *Education Reform Program (1987)*: restructuring of the educational system with a number of policies to improve the access and quality to education, including reducing pre-tertiary education from 17 to 12 years and in-service training of teachers.

2. *The Constitution of Ghana (1992)*: reiterated the fundamental rights of Ghanaian citizens regarding education and the role of the Government in education provision. Article 38 (2) requires the GoG to provide access to free, compulsory, universal basic education (FCUBE) and promote literacy and access to all tiers of education. The constitution also lays out the objectives of decentralisation reform to transfer functions, powers, responsibilities and resources from central government to local government authorities, which was later legislated by local government act, act 462 of 1993 (Akyeampong et al. , 2007).

3. *The Free Compulsory Universal Basic Education Program (FCUBE) (1996)*: in order to fulfil the 1992 constitutional requirement (see point 2 above), FCUBE was introduced to ensure provision of quality free basic education for every child of school going-age in Ghana. The programme established the quality of teaching and learning as one of its key components.

4. *Report of the President's Committee on Review of Education Reforms in Ghana (2002)*: entitled 'Meeting the Challenges of Education in the 21<sup>st</sup> Century', the report re-examines the educational system in the country, identifying the major strengths and weaknesses in the existing structure. It proposes a number of recommendations to improve the provision of quality teacher education including the establishment of a National Teaching Council (NTC), upgrading TTC into diploma-awarding institutions, redesigning the In-In-Out programme, the provision of distance education for training teachers and the improvement of general conditions of service for teachers.

5. *Education Strategic Plan (ESP) 2003-2015*: building on previous policies, this long term plan provides the strategic framework to achieve the EFA and MDGs, with focus on quality of education including

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<sup>3</sup> Including WB, DFID, ADB, NORAD, SDC, GTZ, DANIDA, EU and USAID.

teachers' effectiveness and equity for improvement of educational outputs. Primary education has been selected as a priority sector within the ESP.

6. *Education Reform (2007)*: introduces significant changes to the education system as the extension of formal basic education to eleven years (age 4 to age 15). Other major policies include upgrading of TTCs, improving conditions of service, with special incentives for teachers in rural areas, special needs education improvements, training of teachers in TVET and development of teacher training programmes for kindergarten teachers (MOESS, 2007).

7. *Education Act (2008)*: the Act calls for the establishment of a NTC as foreseen in the 2002 report (see point 4 above), with responsibility for coordinating and regulating teacher education and training programmes.

8. *Pre-Tertiary Teacher Professional Development and Management (2010)*: sets out the regulatory framework for operationalising the policies that guide the development and management of teachers (currently at the draft stage).

Education sector reforms have also been influenced by the international development MDGs and EFA targets as well as the GPRS. The GPRS II recognises human resource development as a central point in Ghana's objective to become a middle-income country by 2015 (WB and GoG, 2006). Within the education sector the strategy prioritizes the improvement of the quality of teaching and learning focusing on expanding teacher retention schemes, ensuring teacher development and deployment, strengthen the supervision of teachers, provision of incentive schemes for teachers, ensuring timely distribution of teaching and learning materials, improving the teaching of science, technology and mathematics in all basic schools; and developing and promoting the use of ICT in schools and institutions of higher learning (WB and GoG, 2006:44).

Moreover the GoG Education Sector Annual Reviews provide an opportunity to evaluate and assess the education sector's performance and progress towards the targets established in the ESP, which can then influence the redefinition of education policies.

### **Later Reforms: the 1987 Education Reforms and 1996 FCUBE**

The educational developments in Ghana have been very much linked with the socio-political events, including a number of changes in government<sup>4</sup>. Given their importance in the education landscape and their implications for the teacher development system, two major education reforms have been the 1987 Education Reform Programme and the FCUBE (points 1 and 3 above).

Primary school fees were abolished in the country as early as 1961 (WB, 2009). Since then, several education reforms have been introducing measures to improve access which brought about positive impacts on enrolments. However, with the political and economical instability that characterized the country in the 70s and 80s, the education system severely deteriorated presenting shortage of trained and qualified teachers, inadequate funding of the sector, lack of teaching and learning materials and infrastructure deterioration (Agbemabiese, 2007).

Against this background, the Rawlings administration launched the 1987 Education Reform Programme to improve access to basic education as well as to improve quality, efficiency and equity in the education sector (Agbemabiese, 2007). A number of measures have been taken, including the significant reduction of pre-university education from 17 to 12 years, synchronizing both the public and private sectors of education (Sackey, 2008). At this stage development partners started to commit significant resources to the education reforms (Mettle-Nunoo & Hilditch, 2000).

However, in the 90s, a number of weaknesses persisted in the education system at the level of content of instruction, school administration and overall management of education, and the reform implementation

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<sup>4</sup> Since independence from Britain in 1957 through to post-colonial periods of the Nkrumah Era (1951-1966), the Ankrah and Busia Era (1966-1972), the Acheampong, Akuffo, Rawlings and Linman's Era (1972-1981), and Rawlings (1981-1986), numerous reforms have characterized Ghana's education system (Agbemabiese, 2007).



was not able to reach the proposed targets (Agbemabiese, 2007). For example, enrolment rates for children at the primary and JSS levels were still low, in particular for girls (Sackey, 2008).

In order to address the shortcomings of previous reforms a new basic education policy, the Free Compulsory Universal Basic Education (FCUBE)<sup>5</sup> was then conceived (Akyeampong et al., 2007). It was also introduced in fulfilment of the 1992 constitutional mandate to provide quality free basic education for every child of school going-age in Ghana.

The FCUBE initiative was launched in 1996, focusing on primary education and aiming at achieving Universal Primary Education (UPE) by 2005. At this time approximately 30% of Ghanaian children of school-going age were out of school (WB, 2009). Since FCUBE was designed to improve the provision and quality of basic education it had as main objectives (MoE, 2003; Agbemabiese, 2007):

- a) expand access and participation for all at the basic education level with special attention to the girl child and the poor; efforts were centred in infrastructural development, refurbishment and maintenance, and the fostering of community involvement in improved educational services;
- b) improve the quality of teaching and learning; including curriculum reform and review; teacher education and reallocation, production and distribution of textbooks, syllabi, teacher's handbooks and other instructional materials; performance assessments and instructional staff training;
- c) improve efficiency in education management; including changes in staffing and personnel management, performance management, budgeting and financial management, and district capacity building and evolution.
- d) Decentralise the education management system

This Education Reform was foreseen to be implemented for a ten year period (1996-2005), with two phases: first phase from 1996 to 2000, with the support of Basic Education Sector Improvement Program (BESIP), and the second phase from 2000 to 2005. In terms of results, the BESIP has been associated with an increase in basic education enrolment both for boys and girls and the improvement in school attendance as leading to a more educated pool of workers (Sackey, 2008) but gender differences in access to education remain, as well as geographical nuances. As for 2003/04 academic year, primary GER at the national level was 86.3% and for deprived districts, 76.1%, still below the expectations of the programme (WB, 2009).

The FCUBE programme had the intention of achieving UPE in 2005, but it has missed this target (Akyeampong et al., 2007; WB, 2009). The programme had set ambitious targets, aiming at increasing access, participation, quality and efficiency in the education sector and during implementation a number of constraints have been identified. One of the particular constraints was the lack of funds which led the Government to negotiate with western donors that then have become influential in Ghana's education reforms (Agbemabiese, 2007). According to the FCUBE 1999 implementation report, one of lessons learnt was that, 'continuing to expand access to basic education and increasing physical inputs into the system are not effective unless the quality of activities at the school level improves significantly' (MOE, 1999:4 in Akyeampong et al., 2007).

One of the policies under the school quality improvement initiative in the FCUBE was to replace all untrained teachers with trained teachers from the Teacher Training Colleges (TTCs). This initiative was later abandoned with the realization that TTCs were not able to increase intake to demand levels as well as the refusal of many trained teachers to accept postings in the most deprived areas. This is further explored on the policies reviewed in this case study (see Section 3.4).

As a follow up to the FCUBE and to further increase access to education, additional strategies have been put in place in recent years, such as the Capitation Grant Scheme Strategy which started in 2004/5 as a pilot and was then scaled up in 2005/6. Although the long term impacts of this policy are still to be observed,

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<sup>5</sup> As Mettle-Nunoo & Hilditch (2000) summarise, the programme was intended to be **Free**: No parents will be called upon to pay fees for tuition and textbooks in the public basic schools; **Compulsory**: Every parent or guardian shall be compelled by law to send his/her child to school on attaining six years of age and shall keep him/her in school until he/she completed the course in basic education; **Universal**: That all children aged between 6 and 14 years should be enrolled in the formal system of education; **Basic Education**: A basic 9 years course of education covering six years of primary and three years of JSS.

a WB/UNICEF study from the experience in six African countries<sup>6</sup> on the School Fee Abolition Initiative (SFAI) to support countries in maintaining and accelerating progress towards UPE, provides already some insights.

According to the findings of the Ghana study, capitation grants are a relatively simple and cost-effective strategy for achieving an immediate impact on access as well as they are a pro-poor strategy since more poor children have enrolled and gender and geographical differences have narrowed (WB, 2009). In the case of Ghana, this strategy has captured further support for education from other stakeholders including NGOs, private sector, district assemblies, and local members of parliament (WB, 2009). However, the study also recognised that ensuring quality of education is the biggest challenge in the context of rapid enrolment increase (WB, 2009). Furthermore, and as for the other case studies, the financial sustainability has been questioned, in terms of the revenues loss from fees usually used for learning materials, with the dangers of increasing PTRs.

The 1987 Education Reforms and the FCUBE have partly been successful in increasing enrolments at the basic level, which has been significantly expanded with the introduction of the capitation grant. FCUBE evaluations in particular revealed that the education reform process has not been successful in terms of improving quality and learning outcomes for children (Okugawa, 2010). The experience of these reforms clearly show that when measures are put in place for increasing access to education complementary initiatives need to be in place for the quality of teaching and learning to be ensured. Also these reforms have received significant support from the donor community who have created pressure and influenced the path of the reforms.

#### 1.2.4. The State of Education: access, enrolments and quality

Overtime different governments have implemented a number of policies and reforms in the education sector which have had impact in terms of access to schooling, enrolments and quality of education. Data for Gross Enrolment Ratio (GER), Gender Parity Index (GPI) and Net Enrolment Ratio (NER) for the years 1999 and 2007 are presented in Tables 1.1 and 1.2.

Table 1.1: GER and GPI in Ghana 1999 – 2007 by Level of Education

	GER (%) - 1999			GPI (%) -1999	GER(%) - 2007			GPI (%) - 2007
	Female	Male	Total	(F/M)	Female	Male	Total	(F/M)
Pre-primary	39	39	39	1.02	69	67	68	1.04
Primary	72	78	75	0.92	103	104	104	0.99
Secondary	33	41	37	0.80	50	56	53	0.89
Tertiary	-	-	-	-	4	8	6	0.54

Source: EFA-GMR, UNESCO (2010)

Table 2.2: NER and GPI in Ghana 1999-2007 by Level of Pre-Tertiary Education

	NER (%) - 1999			GPI (%) -1999	NER(%) - 2007			GPI (%) - 2007
	Female	Male	Total	(F/M)	Female	Male	Total	(F/M)
Pre-primary	-	-	-	-	20	19	19	1.05
Primary	55	58	57	0.96	73	73	73	1.01

<sup>6</sup> Ethiopia, Ghana, Kenya, Malawi, Mozambique, and Tanzania.

Secondary	-	-	-	-	<b>43</b>	<b>47</b>	<b>45</b>	<b>0.91</b>
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Source: EFA-GMR, UNESCO (2010), Data in italics are UIS estimates; Data in bold are for the school year ending in 2008.

At the level of enrolments there has been continued progress in access to education, with a significant increase of the GER for all levels of pre-tertiary schooling from 1999 to 2007, in particular for primary school level (75% to 104%), where gender parity has also been achieved. NER have increased even faster, from 57% in 1999 up to 73% in 2007. The rapid enrolment growth can be linked to the EFA agenda and particularly GoG commitment to education which has resulted in improvements in the performance of the education system.

The gender gap has been reduced for all levels of education but clearly more rapidly at the primary level. The gender gap for secondary education has improved from 1999 to 2007 but male enrolments are still higher, at 56%, compared to female enrolment rates at 50%. At tertiary level the gap also remains high. According to the data from the 2008 Demographic and Health Survey conducted in Ghana gender inequality in education is still quite present: 21% of women compared to 14% of men have never attended school and only 17% of women have secondary or higher education, compared with 29% of men (GSS and GHS, 2009). While the gender disparity in school enrolment at primary and secondary school levels has narrowed substantially in recent years, the picture is different for tertiary education with the total number of female students enrolled in 2007 much lower than male students, at 34% (UNESCO, 2010).

Ghana has extended the goal of UPE to the goal of UBE, covering primary school and junior secondary school. At the end of the basic education cycle students need to achieve an aggregate grade between 6 and 30 in the Basic Education Certificate Examination (BECE) to enter in the second cycle education. According to WAEC data for 2006 a significant percentage of 37.4% of JSS graduates did not qualify to go into SSS (IMF, 2009). The enrolment analysis from the Ghana Country Analytic Report observes a decline in GER by grade, reflecting that as children progress through school the numbers decrease and transition from JSS to SSS is more problematic than from primary to JSS (Akyeampong, 2007). These results suggest that promoting access to education is not sufficient and other dimensions need to be considering at policy level, including the quality of education that is offered.

As an effect of the enrolments expansion in basic education in recent years there has been an increase in the number of education establishments, as showed in Table 1.3 below.

Table 3.3: Number of Schools by Level in 2005/06 and 2006/1007

	Kindergarten		Primary		JSS		SSS	
	2005/06	2006/07	2005/06	2006/07	2005/06	2006/07	2005/06	2006/07
Public	8,659	10,008	12,227	12,888	7,13	7,122	354	473
Private	3,272	3,742	3,080	3,530	1,619	1,932	82	127
Total	11,931	13,750	15,307	16,418	8,749	9,054	436	600

Source: Thesis 2010 (based on EMIS 2006/2007)

According to EMIS data for the academic year 2006/07, there is an increase in the number of schools for all levels when compared with the previous year. In terms of primary schools, in 2006/2007 there were 16,418 primary schools, representing an increase of 7% when compared to 2005/2006. Considering that kindergartens have become part of the official basic education system since the latest education reform, and have been receiving the capitation grant, the increase of the number of schools might reflect the system adaptation to cater for more children who are completing the various levels (Thesis, 2010).

Policy interventions that have contributed to the increased enrolments include the abolition of school fees introduced in the 1990s with the FCUBE followed by the introduction of capitation grants to schools in 2004, improvements in public and private infrastructure, the expansion of school feeding programs and the support for girls access to education namely through cash transfers programmes. The capitation grant in

particular has been considered one of the main contributors to the significant increase in enrolment at basic education level (MOESS, 2006; Akyeampong, 200X).

The latest Ghana MDG Report highlights that the country is on track to achieve both MDG 2 of UPE as well as MDG 3 on gender parity by 2015 (UN, 2010), but based on more optimistic estimates than the latest GMR. Furthermore, some authors have expressed concern with the sustainability of this rapid enrolment growth, which might lead to further pressures on teachers and other resources (Akyeampong et al., 2007), therefore compromising the quality of education.

Retention has also improved, with the number of children completing the full primary education cycle increasing. Nevertheless there is still a large out-of-school population of primary age, of about 930 000 children out of school in Ghana (UNESCO, 2010). The Government estimates that about 20% of eligible primary school children do not enter school, with higher percentages in the northern regions (MoE, 2003).

When moving from the national figures to the district level, significant geographical and gender differences can be observed in terms of access to education. According to the MoE's categorisation of deprived districts<sup>7</sup>, as of the academic year of 2007/2008, there were 53 deprived districts out of the existing 138 districts, spread in all regions in the country, except in the Greater Accra. The majority is concentrated in the three northern regions (see Table 1.4).

Table 4.4: Number of Deprived Districts by Region

Region	Nr. of 'Deprived' Districts	Total Nr. Districts	Percentage of Deprived Districts by Region
Ashanti	4	21	19%
Brong Ahafo	6	19	32%
Central	5	13	38%
Eastern	2	17	12%
Greater Accra	0	6	0%
Northern	17	18	94%
Upper East	7	8	88%
Upper West	2	8	25%
Volta	3	15	20%
Western	7	13	54%
<b>Total</b>	<b>53</b>	<b>183</b>	

Source: Thesis 2010 (on the basis of list provided by the PBME, MoESS).

The classification of deprived/non-deprived districts provides the GoG with a mechanism to identify the needs and inequalities in the regions (Akyeampong et al., 2007). However, within the current education decentralisation process, as mentioned in Section 2.2, districts do not yet have the autonomy or the resources to fully address these inequalities. Further efforts are required if aiming at a more responsive

<sup>7</sup> Fifty-three districts are currently identified as 'deprived' according to the following criteria: input criteria (seating places per pupil; core textbooks per pupil; percentage of qualified primary teachers; per student budget at primary level; PTR at primary level), access criteria (Gross Enrolment Rate; percentage of girls enrolled); achievement criteria (Pass Rate BECE English; Pass Rate BECE Mathematics) (Akyeampong et al., 2007).

approach to education service delivery at district, community and school level to ensure quality education (Akyeampong et al., 2007).

In terms of regional disparities, the deprived areas, and therefore the northern regions, have generally lower education indicators, including at the level of trained teachers, provision of teaching and learning materials, water and toilet facilities (MoESS, 2008). The rates for school attendance for females are lower than those for males and the northern region has also comparatively lower attendance rates for all school ages (GSS, 2008). These inequalities in education can actually be traced back to colonial times where there was a deliberate intention to limit the number of government and mission schools in the northern part of Ghana to ensure the availability of unskilled labour to work in the mines and plantations in the southern part of the country (Bening, 1990 in Darkwah, 2010).

Despite efforts of several governments, the geographical bias in the provision of education has been particularly difficult to address and policies have failed to change this educational disparity (Darkwah, 2010). However, other analysis suggests that over the past few years the geographical and gender differences in education have been narrowing (see WB, 2009).

The efforts to improve access to education in Ghana and the increase in enrolment rates have brought attention as to how to ensure the quality of education. According to the 2007 Trends in International Mathematics and Science Study (TIMSS) conducted among eighth grade students, average students in Ghana, as Indonesia and Morocco, performed below the poorest performing 10% students in higher performing countries such as Japan and the Republic of Korea (UNESCO, 2010). The study found that only 17% of 16-year-olds scored above the low international benchmark, but only around half of the children of this age were in school, which implies that only 9% of Ghanaian 16-year-olds have mastered the most basic maths skills (UNESCO 2010). Substantial disparities between regions in meeting the BECE required grades can be observed, with the proportion of students from the three northern regions obtaining BECE grades below the national average, according to the WAEC results of 2006 (IMF, 2009). Education quality then becomes more compromised in the most deprived areas which face more severe learning achievement deficits and have less qualified teachers.

According to UNESCO data, the pupil-teacher ratios (PTRs) have slightly increased from 29:1 in 1991 to 30:1 in 1999 and 32:1 in 2007 (UNESCO, 2010), which can be linked to the fast increase in enrolments not being matched by the recruitment of sufficient number of teachers. Ghana aims to achieve a national PTR of 25:1 at kindergarten level, 35:1 at primary school level and 25:1 at JSS level, in order to ensure the quality of education (MoESS, 2008). PTRs data breakdown per regions is provided in Section 4.2.

While Ghana has placed UBE as a national priority and over the years has managed to increase access to schooling at all levels and reduce the gender gaps, critical challenges remain to reduce the existing inequalities and improving the quality of teaching and learning outcomes in schools. The situation in Ghana reflects a common picture to other developing countries whereby, as highlighted in the last HDR, despite substantial progress in terms of quantity of schooling and accessing for girls and boys, major disparities remain between groups within countries and difficulties arise to ensure quality education (UNDP, 2010).

Recent efforts are being put in place such as the introduction of a new Basic Education Comprehensive Assessment System to monitor and measure pupil learning achievement and outcomes at primary level with the National Education Assessment (NEA) and the School Education Assessment (SEA) programmes<sup>8</sup> (MoESS, 2006; EC&NAO, 2007). However, the efficient management, training and deployment of Ghana's teaching force are central to ensure an adequate number of motivated and qualified teachers to improve the quality of the educational services.

### **1.2.5. Current System of Teacher Education Training**

The teacher education system in Ghana provides pre-service training of teaching pupils through the existing 42 Teacher Training Colleges (TTCs), 38 public and 4 private, for candidates who wish to teach basic education whilst Universities train candidates who wish to teach in secondary schools. The TTCs are

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<sup>8</sup> The SEA was administered for the first time in 2008 covering 900,000 students in grades 2 and 4 (MoESS, 2006).

post-secondary institutions but in 2004 became diploma awarding institutions (Agbeko, 2007), with the first batch of diploma holders starting to teach in the academic year 2007/08 (Thesis, 2010). Each region has at least one TTC, with Ashanti region having the largest number of teacher trainees for the academic year 2005/6, followed by Eastern Region and Upper West region with the lowest (Agbeko, 2007).

To teach either basic or secondary education, candidates need a secondary school leaving certificate. Entry requirements are aggregate 24 or better in 6 subjects, three core (English language, mathematics and science) and three electives at the senior secondary school level (Bown eds., 2009). Entry requirements also involve an interview and a common college entrance examination although some trainees with minimum requirements may enter college through other arrangements that circumvent the normal passage (Coultas & Lewin, 2002).

In 2000 the In-In-Out system was implemented, entailing two years of training and a third year spent in school undertaking teacher practice. The student is then required to return to college to complete an exam at the end of their course period and if approved, then received their diploma (see Section 4.2).

The TTC produces approximately 7,000 to 8,000 teachers a year (GES 2004, XXX) who then go to teach in basic schools. Yet, despite the increase in admission of teacher candidates in recent years, the TTCs do not have the capacity or the facilities to admit and turn out enough teachers (Cobbold, 2007). The shortfall of trained teachers at the basic level has always been a problem in Ghana since the 1960s (Bown, 2009).

As regards to in-service teacher professional development (INSET), teachers can upgrade their qualifications through further training in the universities for which they can in most cases be granted study leave with pay, continuing to receive their salary while on training. Other options are to obtain non-qualification by updating their knowledge and skills through workshops and seminars (Cobbold, 2007). The INSET is also an opportunity for untrained teachers who want to become qualified teachers to obtain these qualifications.

In terms of INSET programmes, with the implementation of the FCUBE Education Reform, a number of initiatives have been supported by donors to develop and further improve teacher training in Ghana. Two particular initiatives are here described; the Quality Improvements in Primary Schools (QUIPS) project and the Whole School Development (WSD) project.

As part of the USAID funded QUIPS project, from 1997 to 2005, an INSET program was implemented in selected schools. Working directly with teachers and head teachers at the school level and circuit supervisors, the program aimed to improve the overall quality of teaching and learning at the classroom level using an appreciative inquiry support approach in working with district education staff, school level staff, and community members (USAID, XXX). The INSET program included professional development of district level trainers; school based INSETs and residential professional development for teachers, head teachers, and circuit supervisors. The trainings covered components on teaching methods, classroom management, instructional leadership, school-level management and facilitator skill development (USAID, XXX).

In addition to improving the quality of teaching and learning outcomes working at the school and community level, the QUIPS model also aimed at some policy reforms in order to promote effective and sustainable primary education in model partnership schools across Ghana (Okugawa, 2010). According to the programme evaluation, 51.8 M US\$ were provided for technical support and training for teaching staff and community members in 367 selected model school communities (Okugawa, 2010). Improvement in school performance among the selected schools in comparison with neighbouring schools has been reported as well as the success in the community participation component (Okugawa, 2010). According to USAID, while introducing new methods and materials, the program helped teachers improve their instructional skills and practices, allowing teachers to have a more positive impact in their schools.

Also in support of the FCUBE reform was the WSD programme, funded by DFID under their Education Sector Support Programme, focusing on district and school-level interventions. Overall, 40 M GBP were provided through budget support and 10 M through technical cooperation (Okugawa, 2010). The WSD programme was centred on the whole schools concept, with the provision of support to districts and schools in order to improve the quality of teaching and learning. The programme focused on continuous

support to teaching staff, by using a cascade model of training and development to promote education decentralisation in school improvement: head teachers received training in pupil-centred teaching and with the supervision and support from district officials, then provided their teachers with on-site support and training on the basis of identified needs by teachers themselves. WSD also attempted to improve partnerships in schools and enhance the participation and involvement of all key partners in planning and decision-making in school management.

In terms of results, the performance of WSD has been varied with some evidence that teachers and their pupils have benefited from the programme, and that literacy and numeracy were improving but also problems were raised with central and district fiscal management (Okugawa, 2010). There were some cases in which training sessions took place frequently, and teaching style had shifted to a much more pupil-centred approach in some schools. However, in terms of community participation, it seems the School Management Committees had not yet played a substantial role in school improvement (Okugawa, 2010). WSD was considered to have facilitated teacher development in a cost-effective manner as training took place in a local setting and was organised by the DEO. However, the programme depended heavily on the character of the school or the integrity and leadership of the head teacher, the willingness of staff, support and supervision provided by HQ to the DEO. The Okugawa (2010) study found that a major benefit of the WSD intervention was to strengthen existing GES institutions and the schools themselves and promotion of ownership, leadership, responsibility and accountability among district education officers, teachers and community members, through the delegation of financial responsibility to DEO and school levels.

In terms of teacher education, a number of persistent challenges regarding teacher recruitment, training and development have been extensively documented (see Mettle-Nunoo & Hilditch, 2000; Dull, 2006; Agbeko, 2007; Akyeampong et al., 2007; Amedahe & Chandramohan, 2008; Bown, 2009), and can be summarised as follows:

- Shortage of qualified teachers. Despite Government efforts to increase the number of trained teachers in the system and resorting to untrained teachers, there has been a continuous deficit in teacher training in Ghana for the basic level since the 1960s. This is further aggravated considering the lack of capacity of TTC to produce enough teachers for basic education; According to the Multisite Teacher Education Research (MUSTER) on teacher training in Ghana, teacher training system needs to increase output substantially if PTR are not to increase and the proportion of untrained teachers is to be reduced. It was estimated then the need to increase two or three times current output to maintain the level of GER and to cover demand generated by population growth, attrition and reduced dropout.
- Regional imbalance in teacher deployment, in particular as many trained teachers are unwilling to accept postings in deprived and rural areas and those that accept tend to stay for a short period. The undesirability of teaching in rural areas is usually linked with the lack of infrastructure, lack of potable water, poor health services, electricity, poor housing facilities, limited transport and lack of personal development opportunities;
- Low teacher motivation, linked with the low level of remuneration, lack of opportunities for promotion as well as the low social recognition given to teachers in the country;
- High teacher attrition rate, as a result of the above, with teachers leaving for better paid and motivating jobs. Despite the inflow of almost 8,000 newly qualified teachers per year from the TTC, the national percentage of qualified teachers has been decreasing;
- Poor teacher attendance, teacher absenteeism at primary school level seems to have been aggravating in the last 15 years, particularly in rural areas. Transport difficulties to arrive in school, teachers having to travel to town to collect their salaries and teachers engaging in other activities such as farming are some of the reasons usually identified with the high absenteeism.

These challenges then require teacher management structures to be in place and education policies that will ensure effective teacher management, deployment and motivation strategies. The system of teacher development in Ghana is further explored through the specific policies addressed in the next chapter.

### 1.3. Specific Policies to Address Teacher Gap: access, quality and equity in Education

#### 1.3.1. Policies and Goals Reviewed

While education development has been a common theme for the various governments in Ghana, the sector has gone through several reforms over the years to tackle education challenges and to meet the needs of Ghanaian society. The reforms initiated in the 70s in Ghana's educational system have been designed to address a number of challenges and inefficiencies in the education system and have somehow included objectives of teacher education and the preparation of teachers (Agbemabiese, 2007), but these were clearly not at the centre stage.

Following the 1987 Education Reforms and combined with the improvement and stability of the economy in the 1990s, it has been mainly since the adoption of the Constitution in 1993 that education has received increased attention (Amedahe & Chandramohan, 2009) with the implementation of the 1997 Free Compulsory Universal Basic Education (FCUBE) programme. The reforms implemented thereafter had the primary aim of meeting the EFA goals, in particular reaching UPE, which in Ghana has been extended to UBE, as per the constitutional mandate. These reforms have led to rapid expansion of access to education but as seen in Section 2.3 one of the lessons learned is that increased enrolment requires measures to ensure quality provision of education if the gains are to be sustained, including ensuring adequate teacher supply (Akyeampong et al., 2007).

In fact, in the last decade there has been recognition that 'the teacher is central to every education reform process' (GOG, 2002: xxxiii) but this has not been always translated in specific programs within the education system targeting teacher development. Existing policies on teacher education have been somehow fragmented and incomplete, more of a secondary concern that emerged with the rapid expansion of access. With the challenges associated to education expansion, more relevance has been placed in the development of the country's human resources as the strategy to achieve the GPRS growth and wealth objectives. The Education Strategic Plan which covers the period from 2003 to 2015 clearly refers to the need of ensuring an adequate supply of qualified, motivated teaching staff in order to achieve the planned expansion of the education system (MoE, 2003). The 2006 Education Sector Annual Review (ESAR) goes further, placing it as the cornerstone of the entire programme of educational reform (MoE, 2006:11). The recent development of an overarching policy framework regarding teacher development is an attempt to bring together a comprehensive teacher education plan.

The analysis here presented tries to extrapolate from the latest education reforms policies initiatives targeting teacher development with the aim of improving quality and effectiveness of teaching and learning. Yet the effectiveness of the educations reforms in changing general practices in the Ghanaian education system have been questioned by several authors, including if making education more relevant to the needs of society (Agbemabiese, 2007). The frequent changes in the teacher education landscape that could be observed in the last two decades can also be interpreted as a sign of the weaknesses in the system (Agbeko, 2007)

This section reviews these policies, providing an analysis including the background of the policy, its implementation, challenges and lessons learned when information available (see Table 1.5 below)

Table 5.5: Policies and goals reviewed in the case study

Education Policies	Government objective/ EFA goal
1. Teacher Education: Pre-Service Teacher Training	Major focus on improving access but also quality and equity
2. Policies of Teacher Deployment, Motivation and Retention	Major focus on improving quality
3. The Untrained Teacher Training Programme	Major focus on quality and equity



### 1.3.2. Teacher Education: Pre-Service Teacher Training

#### Background

With the increased enrolments at all levels of the education system in Ghana, in the last decade there has been an increased concern with pupils' low standards of achievement, as mentioned in Section 2.4. Results from the Criteria Reference tests, the Performance Monitoring Tests at basic education, the SSS Certificate Examination results and the TIMSS have shown poor learning achievements (MoE, 2003; UNESCO 2010). Pupils' low performance and concerns with low quality of education have brought a focus to the quality of teacher education (Coultas & Lewin, 2002).

In particular, while pursuing the education MDGs and the EFA objectives, the expansion of the education system requires an adequate supply of qualified and motivated teaching force. In addition to a strong commitment to teaching, quality teachers need to be broadly educated, have adequate knowledge of subjects, keep updated on the latest developments and trends in the teaching profession and be confident to facilitate their students learning (Brookman-Amisshah, XXX). The pre-service training that student teachers experience has a significant influence in building in these characteristics throughout the initial phase of teachers' career.

Over the years Ghana has build up a teaching force including a multiplicity of categories of teachers (Agbeko, 2007):

- The pupil teacher
- The 4-year certificate 'A' teacher.
- The certificate 'B' teacher
- The 2-year Post-Secondary Certificate 'A' Teacher.
- The 3-year Post Secondary Certificate 'A' teacher
- The 2-year Specialist/3-year Diploma Teacher
- National service personnel and
- The Graduate teacher.

The existence of so many categories of teachers reflects the evolution of a complex teacher education system in Ghana. Pre-service teacher training programmes have been introduced on an ad-hoc basis and with a responsive nature to the evolving needs of basic education, to meet emergency situations, with teachers being required to undertake more institutional training to upgrade (Akyeampong, 2003). The 4-year post-middle school teacher training programme was phased out in 1991, giving way to only a 3-year post secondary certificate 'A' Programme (Agbeko, 2007), which corresponds to the basic teacher qualification to teach at the basic level. This can be obtained after successfully completing 3 years pre-service training at the TTCs, the focus on the policies here analysed.

Since the 1990s the MoE has implemented some reform activities regarding the structure and content of teacher education in Ghana, yet without making teacher quality and teacher development as the centre of teacher education (GoG, 2002). During these reforms, the scale of investment in teacher education has been quite small compared with the investment in school level inputs such as infrastructure (Akyeampong, XXX)<sup>9</sup> and even with the introduction of the FCUBE to address the weaknesses of the previous reforms, access to basic education has been expanding but has put pressure in teacher demand jeopardizing teacher quality indicators (Akyeampong, XXX).

The report of the President's Committee on Review of Education Reforms in Ghana identified a number of weaknesses in teacher education in Ghana (GoG, 2002), including:

- Unattractiveness of the teacher education programme as a result of the length of time required for an SSS graduate to acquire a Diploma or a Degree;
- Weak grade pupil teachers due to the lack of attractiveness of the teaching profession;

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<sup>9</sup> In the first allocation of resources for the reforms, teacher education received just about 8%, as compared to an allocation of 61% to increase school places and in the second allocation, teacher education received about 2% compared to 63% to expand or build school buildings, and increase supply of furniture and equipment (WB, 2004).

- Absence of links between the needs of the schools and teacher education, resulting in inadequate initial teacher preparation;
- Lack of co-ordination among the various agencies dealing with teacher education such as Ministry of Education, Teacher Education Division, Curriculum, Research and Development Division, Inspectorate Division, Development Partners and NGOs;
- Unsatisfactory packaging of the In-In-Out-In programme of the TTCs;
- Inability of the 38 public TTCs to produce enough teachers for basic education;
- Absence of a well-structured continuous professional development programme as an integral part of the initial teacher training;
- Lack of defined standards for teacher development;
- Lack of alternative pathways for training teachers.

These weaknesses reflect an ineffective and unattractive system of teacher development which requires changes in the structure and content of teacher education. Considering the low quality of the education system, there has been constant pressure from the system for teachers to upgrade from lower qualification levels which has partly contributed to high teacher turnover in the primary education sector (Akyeampong, 2003).

In general teaching is not considered to be an ideal job in developing countries, including Sub-Saharan Africa. Ghana is no exception, with the low social recognition given to teachers (Bown, 2009) and low status job perception by teachers themselves (Akyeampong & Asante, 2005). This makes it harder to attract students with high educational qualifications into the TTCs (MoE, 2003). In a research conducted in four countries with students entering initial teacher training<sup>10</sup> the majority of students from Ghana had only achieved an E grade in the secondary school end examinations (Coultas & Lewin, 2002). When questioned about teaching and the teaching profession the majority of Ghanaian student teachers surveyed responded they would rather have gone to university than the TTC (Coultas & Lewin, 2002), suggesting that in addition to the poor education qualification of trainee teachers, for many teaching was not the first career option. Further research indicates that many students who enter the TTC use it as a long-term strategy to improve academic qualifications to be able to get better jobs (UNESCO, 2000; Akyeampong, 2003). In these cases, as basic education teachers have the lowest status, teaching in primary schools is perceived as a 'stepping stone' to other positions within the GES or other sectors (Hedges, 2002; Akyeampong & Asante, 2005). TTC are unable to attract better academically qualified candidates (Akyeampong, 2003).

As a reflection of these concerns, strategic documents such as the GPRS and GPRS II have formulated teacher development, deployment and supervision as basic education priorities, with focus on quality and optimisation of the use of teachers. It is particularly in the Education Sector Plan for the period 2003-2015 that teacher development policy goals are finally formulated as part of the focus on improving the quality of education for enhanced pupil/student achievement (MoE, 2003). These include not only increasing the supply of teachers available to the system but also making them more effective (including the improvement of teaching practices, learning conditions and support facilities). The education plan also sets a number of goals in order to improve educational planning and management, emphasizing decentralisation with a call for greater involvement of civil society and the private sector as well as school management (ESP, 2003). Further focus is to be placed in administration capacity building at all levels of the system as well as focusing on service and support (ESP, 2003).

### **Upgrading of TTCs to Diploma Awarding Institutions and the In-In-Out System**

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<sup>10</sup> The study was conducted in Ghana, Lesotho, Malawi, and Trinidad and Tobago. For Ghana the sample included 400 student teachers from 4 TTC (out of the 38 public TTC).

In order to improve the supply of quality teachers in Ghana, a number of initiatives have been put in place regarding pre-service teacher training. It was only since 1992 that the implementation of the new teacher education programme began, with the upgrading of all the 38 TTCs to diploma awarding institutions to be called Colleges of Education (COE) and affiliated to the teacher training universities (Agbeko, 2007). This is expected to make the teaching profession more attractive and to be able to attract better qualified students and as a result to lead to the production of better qualified teachers for basic education.

Meanwhile, the 3 year pre-service diploma fully residential programme in basic education has been restructured through an in-in-out model which started to be implemented in 2000. Under this system teacher trainees are to spend two years in college training and use the third year for practical training in the classroom (Agbeko, 2007). This is intended to allow trainees more exposure to the classroom environment, emphasise teaching competencies and development whilst also to increasing the output of trained teachers (Akyeampong & Stephens, 2002). Furthermore, during the third year some of these trainees could also be deployed to fill teacher vacancies, while allowing the TTCs to increase their intake to fill in the vacancies of the 'out' year (Akyeampong, xxx).

However, a number of concerns with its implementation have been raised by tutors, as in the Peki Training Colleague, regarding their capacity and ability to supervise the students effectively while student teachers spend one year teaching at school off campus (Dull, 2006). Similar concerns were documented in the President's Committee Review of Education reforms, regarding poor supervision by tutors due to lack of incentives, logistical challenges and work overload (GoG, 2002). Other pitfalls of this system included too much focus to methodology and practice at the expense of content, lack of accommodation for the teacher trainees, overloaded daily schedule of the out component and logistical constraints to access distance learning materials (GoG, 2002). Recruiting more tutors to support the increased intake would require further investments, yet there has been a decreased investment in TTCs, with the teacher education expenditure share of the education budget decreasing from 4.5% in 2002 to 2.6% in 2008 (MOE 2009 in Akyeampong, XXX)

In parallel there have been a number of changes made to the teacher-training curriculum to meet the challenges of the new teacher training programmes. In the first year students are to consolidate the knowledge of content of materials thought at the SSS and in the second year courses and methodology in education are introduced (GoG, 2002). Finally in the third year students do practical teaching in schools and return to college at the end of the year to write their examinations (GoG, 2002).

The three-year, six semester, pre-service diploma for basic education now includes foundation courses, education and professional courses, practical activities and general studies in the (Agbeko, 2007). The current curriculum is intended to prepare teachers to teach all curriculum subjects for primary and junior secondary levels; to produce teachers who have a clear knowledge of intended outcomes of their pedagogical skills and are skilled in monitoring and supporting all pupils (Agbeko, 2007). The curriculum is also intended to promote cooperation between the TTCs and the local schools through the third year (the out component of the programme) where pupils are to gain practical experience in the classroom.

In terms of curriculum within the pre-service teacher training programme, there have also been some initiatives supported by donors to introduce HIV/AIDS in course materials and train teachers. While in comparison with other sub-Sahara Africa countries Ghana has relatively low HIV prevalence, it might still have significant impacts in terms of educational access, including absence from school, low productivity, financial hardships and non-completion of curricula (Akyeampong et al, 2007). Under the Africa Education Initiative (AEI) in Ghana, a "Window of Hope" HIV/AIDS Curriculum was developed for TTCs and its being used in the national pre-service teacher training program. All teacher trainees are to receive training on HIV/AIDS related issues.

However, as seen above, while teacher training in Ghana is unable to attract better academically qualified candidates, this creates more pressure in teacher training as well as to prospective teacher's confidence in teaching (Akyeampong, 2003). The characteristics of the students entering initial teacher training need to be taken into account when designing the curriculum and proposing changes in the teacher education system.

Following these reforms, Table 1.6 provides an overview of current teacher education programme and qualification profile.

Table 6.6: Teacher Education in Ghana: Programme and Qualification Status

Level	Duration of Course	Entry Level	Certificate Awarded	Level of Teaching after Certification	Remarks
Post-secondary level	3 years	Completion of senior secondary school	Post-secondary certificate 'A'	Primary or junior secondary school	Discontinued in 2004 and replaced with in-in-out diploma programme
Higher Education (non graduate level)	2 years Total duration: from certificate 'A' to diploma = 8 years	Completion of post-secondary + 3 years teaching experience	Diploma	Primary, JSS or senior secondary	Teachers could attain this through distance learning
Higher Education (undergraduate level)	3 years or 2 years for post diploma	Teachers with diploma certificate or senior secondary graduates	B.Ed. Degree	Primary, JSS, senior secondary, or college of education	Graduates are less likely to opt for teaching at JSS level
Higher Education (postgraduate level)	1 year	B.Sc. and BA	Post-graduate diploma in education (PGDE)	Senior secondary or college of education	
Untrained teachers	4 years distance learning programme	Middle school leaving certificate, senior secondary, 'A' level, City & Guilds etc.	Certificate 'A' or Diploma	Primary and JSS	Has current enrolment of about 20,000 unqualified teachers

Source: Akyeampong (XXX)

With the policy changes in the last decade, the number of years that it takes to become a trained teacher with a diploma or degree qualification has significantly reduced. Prior to 2004, a post-secondary student who entered TTCs would require up to 8 years to obtain the diploma qualification (3 years to obtain the certification 'A' qualification, plus 3 years in full time teaching to be able to enrol in the 2 years upgrade programme). By upgrading TTCs to diploma awarding institutions this has effectively cut the duration down to 3 years with benefits in terms of cost reduction and increased supply of trained teachers (Akyeampong, XXX). Also, basic education teachers with a certificate 'A' qualification can obtain either a diploma or Bachelor level teacher qualification after completing two or four years of university-level teacher education programme respectively.

More recently, with the latest education reform of 2007, the teacher categories have been streamlined into two levels of teacher education (Agbeko, 2007), with the Diploma in Basic Education (DBE) becoming the national minimum teacher qualification. The GoG now offers possibilities for teachers to upgrade their qualifications to this diploma, through distance learning programmes (MoESS, 2006):

- For qualified teachers that hold a certificate 'A', a two year distance learning sandwich course is offered to upgrade their qualifications. This programme started to be implemented in 2007 by the TED, in collaboration with the University of Cape Coast and it is estimated to upgrade the qualifications of more than 60,000 certificate 'A' teachers by 2013 (MoESS, 2008). In addition the programme aims to improve the teacher image, status and retention in the service.
- For untrained teachers, a 4 years upgrading programme is offered, the distance learning Untrained Teachers Diploma in Basic Education (UTDBE), which is analysed in Section 3.4.

As part of the latest Education Reform of 2007, the establishment of open universities and distance learning colleges is foreseen as well as remedial courses through distance education for untrained teachers (MoESS, 2007). Other Open and Distance Learning approaches are being explored in Ghana as new models of teacher education. The University of Cape Coast (UCC) and the University of Education, Winneba (UEW) are part of the Teacher Education in Sub-Saharan Africa (TESSA). Established in 2005, TESSA is a consortium of higher education institutions from nine countries in Sub-Saharan Africa together with five international organisations providing an online source for teacher training providing online text based study unit to develop key teacher practices, competences and skills (Anamuah-Mensah & Wolfenden, XXX).

As part of continuous teacher development programmes, these distance-learning initiatives have the potential to motivate teachers to upgrade their qualifications and to reduce the percentage of untrained teacher in the basic education system. Yet, there are a number of reservations, including the financial aspects as the enrolment and tuition have to be covered by the teacher trainees. There were indications that the GoG would subsidize by 50% the Distance Education Programmes offered by the teaching Universities in order to reduce the financial burden being borne by teachers on distance education programmes (MOESS, 2006).

The government policy of upgrading TTCs to diploma awarding institutions and making the diploma certificate the lowest qualification for teaching at the basic school level reduces the career progression path which is expected to contribute to the qualified teacher shortages at the primary level (Akyeampong, XXX). With the reduction of the time required for a SSS graduate to acquire a Diploma, which was one of the factors that contributed for the teaching career not to be very appealing (Anamuah-Mensah & Benneh, 2005), it is foreseen that the teacher education programme will become more competitive than previously.

### Upgrading of TTCs

Under the FCUBE programme, the German Agency for Technical Cooperation (GTZ) has provided support to rehabilitate 35 TTCs and technical assistance for teacher training at pre service level (Mettle-Nunoo & Hilditch, 2000). According to the report on the Education Sector Review 2006, the upgrading of TTCs is continuing, with plans to provide science laboratories, classrooms and libraries in all TTCs as well as training for principals in change management and course credit system and the new TTC Curriculum. Furthermore 15 TTCs will be specializing in the teaching of mathematics and science (MOESS, 2006).

Following the introduction of these policies, some results can be observed by looking at the trends of intake and enrolment rates for student teachers and the number of teachers produced per year in TTCs between 2002 and 2008, as presented in table 1.7.

Table 7.7: Enrolment in TTCs between 2002 and 2008

Teacher Deployment	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008
Total Intake	8,167	8,980	8,989	8,538	9,401	
% Female	45%	43.90%	42%	42.60%	46.60%	
Total Enrolment	19,764	23,999	25,116	25,534	26,025	26,100
% Female	36%	40.50%	45%	42.10%	46.30%	47.08%
Teachers Produced		7,115	7,532	8,300	8,321	

Source: Education Sector Performance Report, MOESS (2008)

The number of student teachers enrolled in TTCs has significantly increased from 2002 to 2005 and then only slightly increased between 2006/07 and 2007/08 with enrolment at 26,100 for 2007/08. The percentage of female students in the overall intake has also been increasing, although still at lower level than male students. In order to increase female enrolment at the TTCs and ensure the maintenance of the 40% quota of female intake, the Government has introduced annual access courses, which can then facilitate so that female teachers serve as a role model for girls in basic schools (MOESS, 2006)

In terms of teachers produced, the capacity of TTC is around 8000 newly qualified teachers per year, below the teacher enrolment which indicates that a number of students do not complete or might be moving to other tertiary institutions (Agbeko, 2007). Furthermore, when comparing this trend with the increased number of students as presented in Table 1.8 below, despite teacher enrolment into training programs being on the increase, it can not make up for the country's teacher requirement.

Table 8.8: Indicators for Basic Education Supply in Ghana, 1996/97 and 2005/06

Attendance (All Ghana)	1996/97	2005/06
Number of students (primary)	2,333,347	3,122,903
Number of students (JSS)	738,057	1,041,002
Number of students in P6	326,003	402,253
Number of students in JSS3 (grade 9 – end of basic)	212,563	279,683
Number of trained teachers – primary	54,572	49,807
Number trained teachers - JSS	32,032	39,920
Number of untrained teachers – primary	18,768	38,654
Number of untrained teachers – JSS	8,385	16,565
Student to teacher ratio – primary	31.8	35.3
Student to teacher ratio – JSS	18.3	18.4
Student to trained teacher ratio – primary	42.8	62.7
Student to trained teacher ratio – JSS	23.0	26.1

Source: Data provided by EMIS Unit Ghana, MOESS in Akyeampong XXX

The data above corroborates the results presented in Section 2.4 whereby following the policies implemented during the Education Reform of 1987, the FCUBE and the Capitation Grant, access to education has expanded, with a significant increase in the number of students both in primary as well as JSS. Nevertheless, at the primary level, the number of trained teachers actually decreased. The student to teacher ratio for trained teacher increased from 42.8 in 1996 to 62.7 in 2005 showing the increased gap between student intake in basic education and the supply of trained teachers.

Meanwhile, the number of untrained teachers more than double for the same period for basic education. These findings suggest that as access to schooling increased, the planning and policy measures pursued have not managed to ensure adequate production and utilization of trained teachers as access improved (Akyeampong 2009). This shows challenges not only at the level of producing enough teachers but also issues with teacher deployment and reallocation. This is also seen by the discrepancy between the percentage of trained teachers at the national level and the poorest regions (see Section 3.4.). Table 1.9 presents the trends in PTR for basic schools between 2003 and 2008 with a regional breakdown.

Table 9.9: Trends in Pupil Teacher Ration in Basic Schools from 2003 to 2008

Year	2003/04	2004/05	2005/06	2006/07	2007/08
<b>Kindergarten</b>				32,8	55,1
<b>Primary</b>					
National	34	34,9	35,7	33,5	34,1

Northern Region	38,6	40,2	38,0		
Upper East	58,9	57,4	48,0		
Upper West	46,2	49,0	40,0		
Deprived Districts	39,5	41,9	40,2	36,3	38
<b>JSS</b>					
National	18,6	19,0	19,4	17,6	17,4
Northern Region	24,0	25,4	22,9		
Upper East	25,1	25,1	24,9		
Upper West	20,3	24,1	22,0		
Deprived Districts	20,9	22,0	22,5	18,9	19,1

Source: MoESS 2006 Preliminary Education Sector Performance Report in IMF 2009/MoESS 2008

Since the 2007 Education Reform, with kindergarten level becoming compulsory, increased enrolments can be observed and PTR have rapidly increased from 2006/07 to 2007/08 as the number of trained teachers not yet keeping the pace.

The regional disparity is evident with most deprived areas lacking teachers and having PTR at 38:1 for 2007/08 higher than the national average at 34:1. The Northern Region has registered a decline in the PTR which the GRSP Annual Progress Report attributes this to the attraction of more pupil teachers to the teaching profession as a result of the UTDBE (IMF, 2009). There is much disparity between urban and rural districts with the PTRs in all the major metropolitan districts are in the low twenties and in very rural and deprived areas are in the region of 40-60. Thus, the wide variations in PTR can be seen as an indicator of inefficiency in the system. The PTRs demonstrate poor deployment of teachers, over-supply of teachers in response to reported vacancies and very light subject teaching loads (MoE, 2008).

### Further Considerations

In the past teacher education has received very limited attention but in recent years the increased expansion of free universal primary education has brought an increased focus on teacher education reform in order to meet the demand for trained teachers for an expanding primary school system (Akyeampong, 2003). Teacher education reform per se has not been a priority in the former education reforms but the system has been adapting to respond to the increased access requirements. With the concerns around the low quality of basic education, in recent years the GoG has reiterated objectives to improve teacher development at all levels of education (GoG, 2005). The GoG has recognized that 'the availability of an adequate supply of professionally trained and suitably motivated teachers is the cornerstone of the entire programme of educational reform (MOESS; 2006: 11).

According to the UNESCO projections of the global demand for primary teachers needed to achieve UPE by the target year of 2015 it is estimated that Ghana needs to expand its teaching force annually by 1.1%, excluding the replacements needed for approximately 5% of teachers who leave the profession every year (UIS, 2010). This is below the average in sub-Saharan Africa whereby countries need to expand teaching forces annually by 6.3% to provide quality education for all primary school-age children by the target year of 2015.

As in effect the government has then been implementing a number of policies including the introduction of the In-In-Out programme, the upgrade of TTC to colleagues of education and diploma awarding institutions and improving TTCs infrastructure. These efforts to increase the number of teachers by reducing the number of years to become a teacher and upgrading the TTCs are increasing the number of candidates admitted into teacher training. However, these programmes are yet to ensure the required supply of the number of teachers required to meet the objectives of FCUBE and the EFA goals. The TTC do not have the facilities or the capacity to admit and turn out enough teachers. Furthermore, if the teacher training institutions want to attract more and better qualified applicants, the attractiveness of a career in teaching in Ghana has to be rethought.

The government is trying to find alternative solutions such as the recent recruitment of 500 new national service teachers, and re-engagement of 500 professional teachers as well as much as 1,800 youth being

recruited through the National Youth Employment Program (NYEP). The NYEP makes available to the districts newly recruited educated youth to serve as teachers (IMF, 2009). However, a sustainable solution is yet to be found.

The issue of teacher training and development in Ghana is not only the lack of teachers, in particular in the most deprived areas, but also the overconcentration of teachers in the urban areas (MoE, 2003), as one can extrapolate from the distribution of PTR. According to the baseline assessment of efficient and equitable deployment of teachers there are inefficiencies in the utilization of basic education teachers with a number of districts being understaffed and others overstaffed (Perry, 2007). The report also points out significant disparities in the equitable supply of teachers both across districts and within regions (Perry, 2007).

This means Ghana is facing problems not only in terms of producing a sufficient number of teachers more to redistribute and deploy them to the most deprived regions as well as to implement effective pre-service and in-service teacher training systems. The teacher education programmes have to be reformulated to enable teachers to improve but also to motivate them.

To ensure effective and optimum utilisation of teachers, there is a need to have accurate data and statistics on teacher availability and deployment (MOE, 2003). To this end, the GoG has requested technical assistance to establish a teacher supply/demand forecasting model that will enable the production of teacher demand and supply forecasts (Perry, 2007). Furthermore, as announced in the 2010 budget statement, the GoG has conducted an audit of employees of the GES in July-August 2009, covering 25,000 educational establishments (MoFEP, 2010). Yet there is a need to have a comprehensive policy on teacher supply and demand (Akyeampong, XXX).

In order to improve the teacher management system, with the Education Act of 2008 there is a call for the establishment of a National Teaching Council to coordinate and regulate teacher education and training programmes. As part of more recent initiatives the Government is also planning to organize training programmes for teachers, heads of schools and Directors of Education on the use of the School Education Assessment (SEA) and the National Education Assessment (NEA) results, to enhance proper assessment of pupil learning outcomes (MoFEP, 2010).

### **1.3.3. Policies on Teacher Deployment, Motivation and Retention**

#### **Background**

As explained in the previous section, with the expansion of education in terms of access to basic education, a number of concerns regarding the low quality of education in Ghana have brought in focus to the quality of teacher education. This implies not only ensuring adequate teacher training as well as there is a need to consider the commitment and motivation of teachers.

In 2002 it was estimated that the average teaching life of a teacher was only 4 or 5 years (MoE, 2003), even lower than in 1995 when it was estimated that 50,2% of male teachers and 36,1% of female teachers had 8 years or more teaching experience (MOE, 1995 in UNESCO, 2000). When considering teaching experience as a proxy indicator of teachers' commitment, the fact that teachers leave the profession after few years reflects teachers' low motivation and dissatisfaction. In the report of the President's Committee on Review of Education Reforms it was recognized that it is becoming more and more difficult to attract and retain teachers at all levels of the education system (GoG, 2002). The situation seems to be even more critical for teachers working in the TVET sector (Agbeko, 2007).

Several factors have been associated with teachers lack of motivation and job satisfaction including low salaries, lack of incentives, poor conditions of service, lack of teaching and learning materials, increased workload with the demands of several education reforms, etc. In their study on teacher motivation and incentives in Ghana, Akyeampong and Asante (2005) found that given the poor living and working conditions in rural areas and the low prospects of professional development, there seems to be lower morale among rural teachers than urban teachers. It is also in the most deprived areas that the PTR is significantly higher (see Section 2.4). It is then not surprising that many trained teachers are unwilling to



accept posts in deprived areas or only stay for a short period before seeking transfers (Akyeampong & Asante, 2005; Bown, 2009). In an analysis of newly trained teachers' experiences and perceptions of the posting<sup>11</sup> conducted in 1999 and 2000, evidence suggested that if teachers were allocated to rural postings, some would try to find alternative posts in urban government schools or in private schools (Hedges, 2002). Newly trained teachers tend to select the urban regions for their initial posting: Greater Accra, Ashante and Eastern Regions (Hedges, 2002). It is not surprising, as these are the most prosperous regions, with more opportunities and less deprived districts (see Table 2.4.4, Section 2.4). These factors contribute not only to lower teacher motivation as well as to a high teacher attrition rate in the Ghana Education Service.

If one considers the progression of when student teachers become newly qualified teachers (NQT), from the MUSTER project findings it seems that most have difficulties in the initial years of teaching due to lack of professional and social support including late payment of salaries, accommodation needs and insufficient induction into teaching as well as inadequate curriculum training (Akyeampong, 2003). In Ghana, after obtaining their diploma, newly qualified teachers do not go through an official policy on induction and mentoring which as a result makes them feel neglected by the system (Cobbold, 2007). It is then up to the head teachers and other colleagues in basic schools to assist the new teachers in their new roles, but without any formalized process. While recognizing that there are a number of factors that impact on the NQT experience in their first post, including the relation with the community and the head teacher, in Hedges's study of the experiences of NQT<sup>12</sup> the lack of beginning teacher induction or orientation was an issue raised by teachers (Hedges, 2002). This might be particularly severe in situations where teachers feel isolated from professional colleagues and the district office and have a perceived hostile attitude from community members (Cobbold, 2007).

Also linked to the low teacher morale and poor working conditions are the teacher absenteeism and lateness. According to several studies these have been a widespread problem in Ghana at the level of primary school and more likely to occur in rural than in urban schools (Akyeampong et al., 2007). According to the WB impact evaluation of basic education in Ghana, in 2003 'nearly 13% of teachers had been absent in a month compared to just over 4% in 1988' (WB, 2004:101). The study also found that in the rural areas the situation is further aggravated and explore some of the reasons, such as transport problems, the need to travel to town to collect the salary and rural teachers needing to attend to farming activities (WB, 2004). On the other hand, low accountability to parents and students has been raised as an issue linked to the monitoring and evaluation of teachers (NDCP/UNDP, 2010), whereby communities are not able to account for the teachers poor attendance. According to MoE estimations teacher absenteeism problems cost more than GH¢100,000,000 per year (MoE, 2008).

Considering these challenges, the report of the President's Committee on Review of Education Reforms in Ghana suggested the implementation of incentive package schemes to motivate and encourage teachers' commitment (GoG, 2002). The recommendations included the improvement of general conditions of service with the payment of competitive salaries, provision of decent accommodation and enhanced retirement benefits, among others (GoG, 2002). The report also suggested a number of actions to address the specific situation to encourage teachers to accept posting in deprived areas, including the payment of hardship allowances, accelerated promotion, priority in study leave applications, improvements in teacher accommodation and provision of teaching and learning material. Some of these actions have been taken forward in the ESP.

## **The Policies on Teacher Deployment, Motivation and Retention**

In order to improve the quality of teaching and learning to increase pupils' achievements, over time the Government of Ghana has been introducing a number of policies and initiatives in an attempt to increase teacher motivation and retention, in particular in rural areas. The 2003 ESP lays out the strategies to improve the effectiveness of teacher preparation, upgrading and deployment at all levels, with particular emphasis on the recruitment and deployment of females and to develop a motivated teaching cadre for all

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<sup>11</sup> Research conducted as part of the MUSTER project, interviews with members of the education bureaucracy and a sample of 23 graduates from two training colleges in the Central Region.

<sup>12</sup> Study conducted with 23 newly qualified teachers in Central Region, Ghana (Hedges, 2002).

levels with support from the private sector, civil society and development partners (MoE, 2003). Linked to this objective, the plan also proposes to strengthen and improve educational planning and management while deepening the decentralization process (MoE, 2003). Below there is a description and analysis of the major initiatives to date.

### **Best Teacher Award**

The Best Teacher Award Scheme was launched in 1995 aiming to motivate teachers by recognizing the achievements of dedicated and effective professionals on one hand and to raise public awareness of teachers contribution to national development on the other hand (Akyeampong & Asante, 2005). Eligibility for the awards include all teachers that have been teaching for at least five years and preference is given for teachers that have worked in rural areas, with the selection starting at the lowest level up to the national level (Thesis, 2010). However, the recommendations from the 2002 presidential report suggest that the teacher selection for the award is not without controversy. In the report the GoG proposes to have a more open and transparent process of selection and widen the coverage to include not only the teacher but also the school that facilitated the winning of the award (GoG, 2002). Issues with the selection processes have also been raised by a number of teachers that took part in a recent study, as the majority who did not receive rewards might feel their work is not recognized or appreciated (Thesis, 2010). Further recommendations have been made towards expanding the benefits of this initiative, with the sharing of best practices and experiences with other teachers and rewarding outstanding teachers at the school and community level (GoG, 2002).

### **Incentive Packages**

One of the strategies used by the GoG in the last decade to attract basic school teachers in deprived areas is the provision of material incentives. The allocation of incentives started in 2001 with the distribution of 5000 radio cassette players and 5000 sets of cooking utensils to teachers in deprived areas. In 2002, 9000 bicycles were distributed and in 2006, 8280 bicycles were provided in the 53 deprived districts (Thesis, 2010). In addition to these GES incentives, the District Assemblies (DA) also decides on other incentive packages to attract teachers, including solar lamps, radios, cooking utensils, bicycles, and others (Thesis, 2010).

### **District Sponsorship Scheme for Teachers**

In order to address the shortage of qualified teachers in deprived areas and improve teacher deployment, a new scheme started in 2000/01, whereby teacher trainees are sponsored by districts during their studies and after they are contracted to teach for at least three years in the district that sponsored them (MOESS, 2006; UNESCO, 2007). As part of the enrolment requirements, applicants for the TTC have to identify which districts are offering them sponsorship (thesis, 2010). In 2006, 98% of the 9,000 trainee teachers enrolled were sponsored by a DA (IMF, 2009). Through this scheme the DA ensures the provision of newly trained teachers.

In the 2006 Education Sector Annual Review the Government reaffirmed that the incentive packages, access to training and accelerated promotion will continue to be provided, as well as the District Sponsorship Scheme for Teachers (MOESS, 2006).

### **The Capitation Grant Scheme for Basic Schools**

Already mentioned in Section 2.3, the Capitation Grant Scheme was introduced in 2004 as a pilot in the primary schools deprived districts and was then scaled up in 2005 to all districts. While part of the education decentralization strategy, one of the objectives of the capitation grant was to motivate basic school teachers by offering them more control over school management and professional development in managerial skills (Thesis, 2010). However, in the study some head teachers reported that the autonomy of decision to use the capitation grant is limited as they need to get authorisation from the DEO (Thesis, 2010). Furthermore, with the rapid rise in enrolments due to the capitation grant, a gap in classroom infrastructure was created and additional pressure was introduced in the education system regarding teacher requirements (Akyeampong, XXX).

## Study Leave Policy

The study leave with pay has been introduced for some decades as an opportunity for teachers to upgrade their qualifications (Akyeampong, XXX). This scheme allows trained teachers to apply for financial support to go back to school as full-time students and upgrade their certificate qualifications to diploma and degree levels, while continuing on full salary (thesis, 2010). In order to apply for this scheme, teachers need to be in teaching service for a minimum of three-years or, if serving in deprived areas they can apply to university after two years (Dull, 2006). According to the findings of a qualitative study of the experiences of newly qualified teachers in Ghana, study leave has been a key motivation for newly posted teachers (Hedges, 2002).

The study leave policy was introduced to address the shortage of qualified teachers by upgrading teacher qualifications on the assumption that teachers would then return to the classroom with improved skills to contribute to raise the quality of teaching and learning. But overtime the policy became part of the problem it was trying to tackle, as has been seen as a major contributor to teacher shortages (Akyeampong, XXX). In terms of teacher supply, the study leave policy was actually responsible for a significant decrease in terms of the teaching force, as it can be seen in Table 1.10 with less than 400 new teachers being added to the teaching force each year, despite the TTC output of more than 6000 newly qualified teachers since 1997.

Table 10.10: Number of Teachers on Study Leave in Relation to Output from TTC

Year	Nr. Graduating from TTCs in July	Nr. Approved for study leave from Sept.	% equivalent of TTC output approved for study leave	Additional Withdrawal from TTC pool
1997/98	6114	3149	52,0	+2965
1998/99	6858	4411	64,3	+2447
1999/2000	6417	6343	98,8	+74
2000/2001	6596	10103	153,0	-3507
2001/2002	6362	6247	98,2	+115
2002/2003	6955	6076	87,4	+879
2003/2004	4676	5000	107	-324
Average addition				378

Source: Quansah (2003) in Akyeampong & Asante (2005)

According to GES and GNAT data regarding basic school teacher from 1999 to 2002, on average the majority of those granted study leave each year do not return to teach at basis school level (Akyeampong & Asante, 2005, Cobbold, 2007), hence this policy as actually been a major contributor to teacher attrition in Ghana. Furthermore, it started a catalytic effect, as found in the MUSTER research whereby many students entered the TTC already with the intention of accessing the study leave policy and after move into secondary teaching or higher (Akyeampong, 2003).

In addition to the significant administrative and management costs, with the recognition that this policy has not been very effective as the pubic sector is producing graduates who then leave the profession, in the 2003 ESP there was a call to revisit the study leave policy (MoE, 2003) and more recently there have been recommendations for its abolition (MoE, 2008). The number of study leave places has been significantly reduced to around 3,000 in 2004/2005 (Akyeampong & Asante, 2005) and a quota system introduced for the 2006/07 academic year for particular subject areas where there are inadequate numbers of teachers and candidates are selected on this basis (MoESS, 2006). This has reduced the number of teachers leaving the classroom to pursue further studies and teachers are now being encouraged to enrol in the distance learning programs described in the previous policy, as to upgrade their qualifications.

## Further Considerations

The Government has been implementing a number of strategies to improve teacher morale, increase retention in the system and address the regional imbalance in the deployment of teachers. Some of these initiatives aim to recognize the status of teacher and provide material support, such as the incentive packages and the best teacher award scheme. While these recognition schemes are welcomed, research suggests that such incentives alone are insufficient to increase teacher motivation.

In order to motivate teachers to become more efficient, additional policies need to address the conditions of service as well as the need for public recognition, opportunities for professional development and the creation of an effective organizational culture (Akyeampong & Asante, 2005; thesis, 2010). A recent study researched basic school teachers' perceptions and attitudes towards teaching as a career in two deprived districts in Ghana<sup>13</sup>. This found that the system of teacher management and organisation support for teachers and in particular the system of transfers and promotions was an important contributing factor for the teachers' lack of motivation. The main role for the GES and the DEO in this is ensuring the recognition of teachers as well as to promote their professional development. However, the GES system has been criticized for being highly bureaucratic, open to influence, and unable to pay salaries on time (Hedges, 2002).

The lack of a formal induction and orientation programme for newly qualified teachers is a gap identified in teacher education service which should be addressed in order for the pre-service preparation to have effective results and to avoid further attrition. It has been suggested that a systematically planned programme is developed and implemented in teacher education policy to offer support to the new teachers so that they can survive and succeed in their professional practice (Cobbold, 2007). This would require the routine practices of the schools and districts to incorporate this in their daily practices.

Other strategies have provided opportunities for professional development, such as the study leave policy. With the study leave scheme, in a number of cases it has been observed that it actually contributed for teachers to move out of basic school teaching into secondary school or other areas. This raises the challenge posed by very low returns from the public investment in training primary teachers (Akyeampong, 2003) and the policy needs to be revised and made more accountable if to bring about benefits to the primary education system (Akyeampong & Asante, 2005). One possible alternative would be to decentralize teacher recruitment and budget management in order to facilitate districts control over the hiring and sponsoring of teachers (Akyeampong & Asante, 2005). As an alternative to the study leave, the Government has recently created distance learning programmes to provide the professional training for trained and untrained teachers in service while avoiding the study leave payments. Yet, unless primary teacher career offers an attractive structure, it is likely that teachers will continue to leave the profession.

Considering the estimated annual output of almost 8,000 qualified teachers from the TTC, the impact of the above initiatives to retain trained teachers in basic education seem quite limited. Overall, from 2002 to 2008 there has been a significant decrease in the percentage of trained teachers at primary and JSS levels, as showed in Table 1.11 below. When comparing the percentages of trained teacher in the north and in deprived districts at primary level there is a high discrepancy against the national teaching force, suggesting teacher attrition is actually increasing in particular in the deprived areas. According to the MoE, these trends can be partially explained with the increased number of national youth employment placements in schools, which is higher than the rate at which trained teachers are graduating and existing teachers are upgrading (MoE, 2008). With the inclusion of Kindergarten in the compulsory education system, the percentage of trained teachers at KG level has increased from 2006/2007 to 2007/08.

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<sup>13</sup> Field work conducted in Aumisoie and Ponkujaku districts in 2007/2008 (Thesis, 2010)

Table 11.11: Percentage of Qualified Teachers in Basic School between 2002 and 2008

Teacher Deployment	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008
<b>Kindergarten</b>	n.a.	37,9	32,7	33,10	35,3	42,9
<b>Primary</b>						
National	73,6	73,9	72,4	70,8	62,1	59,4
Northern	58,5	52,2	51,6	54,3		
Upper East	67,1	74,8	70,3	74,0		
Upper West	75,6	77,1	78,5	82,6		
40 deprived	56,0	55,3	53,2	55,9	42,8	37,2
In other districts	80,5	81,0	79,8	n.a.		
<b>JSS</b>						
National	85,3	84,2	83,5	85,5	77,2	76,4
Deprived		75,9	73,9	77,7	64,2	62,9

Source: MOESS, 2005a:42 in Akyeampong et al. 2007 and MOESS 2006 in IMF 2009

These results suggest that despite Government efforts to increase teacher motivation and attract teachers to rural areas, while offering professional development opportunities, further efforts are required regarding teacher recruitment, training and deployment. Some authors argue that the further decentralization of the education system would contribute to the effectiveness of teacher deployment as districts would be better placed to decide the policies and strategies to attract qualified teachers (Akyeampong & Asante, 2005). Teacher management structures also need to be addressed at the primary school level, as they do not seem to be able to motivate teachers at present, and to tackle absenteeism and lateness. This includes measures to strengthen accountability at the school level between parents and teachers (MoE, 2008).

In the report on the Education Sector Annual Review 2006, the MoE identified the need to conduct a review of teacher management, development and practice in order to address the teacher gap in remote areas through the development of attractive terms and conditions (MoESS, 2006). In 2008 the MoE indicated that the distribution of teachers remained highly skewed to the disadvantage of the deprived areas and it is observed that the government spends about 25% of its entire budget on teachers (including salary, paid study leave, sponsored distance education, etc.) to overcome the shortage of teachers (PDCP/UNDP, 2010). Addressing the challenges of teacher deployment will be essential for achieving quality education for all by 2015.

#### 1.3.4. The Untrained Teachers Diploma in Basic Education (UTDBE)

##### Background

One of the challenges in the education sector is how to ensure the quality of the teaching force, particularly relevant to Ghana which relies on a high number of untrained (pupil) teachers in the country's education system. This is a common challenge to many sub-Saharan African countries and it is estimated that more than half of the teachers in the region are unqualified (Anamuah-Mensah and Wolfenden, XXX). Many untrained teachers have many years of teaching experience but lack formal teaching qualifications which would assist in their classroom practice and improve quality education (TED/GES, 2010). In Ghana, untrained teachers are considered as 'the backbone of the rural teaching service' (TED, 2004), filling the gap in deprived areas with acute teacher shortages, particularly in the North of the country. This despite

receiving lower pay and having lower status and less professional development incentives than their trained colleagues (Hedges, 2002).

As per the data collected by the TED (see Table 1.12), the great majority of untrained teachers is concentrated in five regions: Western, Ashanti, Eastern, Brong-Ahfo and North, accounting for 80% of all the untrained teachers and reflecting that these teachers are serving in the most deprived areas. As a consequence, children in rural areas tend to have less qualified teachers than children in urban areas.

Table 12.12: Regional Distribution of Untrained Teachers

Region	Nr. Untrained Teachers	Percentage Untrained Teachers
Western	4378	18,5%
Ashanti	3959	16,7%
Eastern	3840	16,2%
Brong Ahafo	3633	15,3%
Northern	3147	13,3%
Volta	1676	7,1%
Central	1502	6,3%
Upper East	806	3,4%
Upper West	650	2,7%
Greater Accra	108	0,5%
Total	23699	100,0%

Source: TED, 2004

In terms of teacher deployment, data from the MOE from 2005 also shows a declining trend for the Northern region and in particular the 40 deprived districts in the percentage of their primary qualified teachers as a percentage of the teaching force (Akyeampong et al., 2007). At the level of JSS the percentage of qualified teachers has also felt over the years at the national level, despite an annual output of almost 8,000 qualified teachers from the TTC reflecting a high rate of teacher attrition (Akyeampong et al., 2007).

Some attempts have been made by the GoG to address the supply of trained teachers and reduce untrained teachers in the education system, either by upgrading their qualifications or by replacing them by qualified teachers, bringing different outcomes. During the 1990s a programme to upgrade untrained teachers to qualified status has contributed to a significant improvement of the primary teacher qualification status, which was then partly followed by a policy to replace all untrained teachers with qualified teachers from TTC, under the FCUBE (Akyeampong and Asante, 2005). As part of the FCUBE school quality improvement initiative, the plan was to phase out untrained teachers and replace them with qualified teachers. Yet, with the realisation that untrained teachers were still being required, the Government decided to abandon this policy.

Three main reasons are usually identified for the increase of untrained teachers: the inability to increase the intake at the TTC to match the demand<sup>14</sup>; the high attrition among newly qualified teachers (including the loss from the system of qualified teachers taking study leave and not returning to basic education) and finally the unwillingness by many trained teachers to serve in rural or deprived areas (TED, 2004; TED/GES, 2010). An additional reason can be the growth of the private school sector, where usually there is no requirement for teachers to be trained (WB, 2004).

As a reflection of these policies, from 1987 to mid-90s there has been a significant reduction of the percentage of untrained teachers from 50% to 20% in primary schools and 35% to 14% in JSSs but the decline has then been reversed, particularly in primary schools, with the number of untrained teachers

<sup>14</sup> According to MUSTER projections the estimated demand for new teachers and training to qualify the untrained teachers is more than double the output from the training colleges (Akyeampong, 2003).

increasing<sup>15</sup> (WB, 2004). In the report of the 2002 President's Committee on Review of the Education Reforms there was recognition of the lack of opportunities to upgrade the status and competencies of untrained teachers (GoG, 2002). In the last years the number of untrained teachers in basic education has continued to increase, in particular in the primary schools, as showed in Table 1.13.

Table 13.13: Trained and Untrained Teacher Supply in Ghana: 1996/97 v. 2005/6

Teachers	1996/97	2005/06
Untrained teachers: primary	18,768	38,654
Untrained teachers: junior secondary	8,385	16,565
Student to teacher ratio – primary	31.8	35.3
Student to teacher ratio – junior secondary	18.3	18.4

Source: Ghana Ministry of Education, EMIS data (STR includes both trained and untrained teachers)

The MUSTER project had already highlighted that the education system in Ghana did not have the capacity to meet future demand as per the FCUBE and the research recommended that instead of replacing untrained teachers, who sometimes are the most committed to teaching, TTC could provide in-service training for these teachers (Akyeampong, 2003).

During 2003 the TED of the GES conducted an extensive analysis of the teacher education situation in Ghana out of which the training of untrained teachers was identified as a key strategic objective (TED, 2004). Their high level of commitment in rural deprived areas has also been recognised in the Education Strategic Plan 2003-2015 as a major strength (MoE, 2003). In order to address the supply of trained teachers, the TED then developed in 2003 a plan to upgrade all untrained teachers in Ghana through a flexible ICT enhanced open distance learning programme, the Untrained Teachers Diploma in Basic Education (UTDBE). The situation analysis found that there were about 24,000 untrained teachers (out of 128,000 teachers) and that it would be possible to train about 92% through this programme. It also revealed that most untrained teachers were willing to enrol in the programme in order to enhance their professional status and to increase their salary, to gain more experience and to be able to pursue the studies whilst continuing with their classroom teaching (TED, 2004).

### The UTDBE Programme

The UTDBE is a 4 years in-service teacher development programme for pupil teachers, leading to the award of a Diploma in Basic Education. Compared to the traditional teacher training offered in the TTC, the programme runs for a longer period (part time 4 years rather than 3 years full time period) and the pupils take their courses in-service while teaching in school. The teacher training UTDBE model uses a school-based distance learning approach consisting of a combination of printed materials and school based professional development supported by residential and conventional face-to-face meetings (TED, 2004). As part of the programme, a number of support structures were foreseen: study materials, induction, district support, study tutorials, study circle meetings, lesson observations and residential face-to-face meetings (TED, 2004).

Specifically the UTDBE aims to (TED, 2004):

- Produce generalist teachers capable of teaching subjects at the primary and JSS levels;
- Produce teachers who have a clear group of intended outcomes of their teaching activities who are skilled in monitoring, diagnosing and in providing the appropriate provision of equal opportunity to all pupils;
- Promote close working relationships between TTC, local schools and district offices and other areas of teacher education system.

<sup>15</sup> Data from WB: trend in trained teachers 1984-2000.

The programme was to be implemented in four phases<sup>16</sup>, starting with the three northern regions and Afram Plains as a pilot phase. As the main outcome it was expected that over 90% of the eligible untrained teachers would enrol in the programme, with the majority (70%) completing the programme by 2010 (TED, 2004). The programme aims to reduce the level of untrained teachers from 21,2% at the primary level and 12,8% at the junior secondary level to no more than 5% throughout basic education by 2015 (WB, 2009). The ESAR 2006 refers to the target of training all teachers through distance learning by 2015 (MOESS, 2006)

While providing untrained teachers with access to professional training, certification and qualified teacher status, the UTDBE programme seeks to improve the quality of teaching which is then expected to reflect in quality improvements in children's learning achievements. Considering that the majority of the untrained teachers are working in some of the most isolated, rural and under-served areas of the country the programme also aims to improve equity for those in the poorest schools (TED, 2004).

The use of an ICT enhanced ODL model with the application of low-level technology were expected to facilitate the expansion of programme delivery and enhancing the quality of the training, with the TTCs serving as the apex providing training and support to field based support teams and trainees (TED/GES, 2010).

### **UTDBE Programme Outcomes**

The UTDBE started in March 2005 with a first intake of 5,000 teachers followed by 8,000 in September 2005 (WB, 2009). The first batch of trainees completed the programme last year and were expected to receive their certificates in 2010. Although this is a relatively recent policy which has a life span of 5 years, it expresses the commitment of Ghana to meet the EFA goals in particular access to quality education for all, and some of the outcomes can already be observed. These outcomes are based on the key findings of a recent evaluation conducted in 2010<sup>17</sup> also bringing lessons regarding teacher education policy and practice.

Since its first year of implementation in 2005 the programme as reached about 26,126 untrained teachers<sup>18</sup>, at a relatively low cost. One of the advantages of the ODL programme is that the trainees continue to teach while doing the training programme. Therefore, when comparing to the full time residential training, the UTDBE is an attempt to retain teachers in the classroom as it does not create vacancies that lead to teacher shortages (Akyeampong, XXX).

The findings from the evaluation, in particular from classroom observation<sup>19</sup> suggest that 'the UTDBE programme is making a difference in terms of trainee classroom practice' (TED/GES, 2010:7). These results may partly be explained by trainees' motivation and commitment to improve their professional skills, cited by the majority of the survey respondents as the main reason to enrol on the UTDBE programme. It can also result from the possibility to apply directly what they learned from the programme in their classrooms, therefore accelerating the quality of teaching and learning, an advantaged foreseen at the stage of programme formulation (TED, 2004).

Considering that the majority of the untrained teachers are working in deprived areas, retention is likely to be higher than trained teachers in TTC who refuse to be posted in rural areas or leave the teaching profession (TED/GES, 2010). These views were shared by both trainees and principals interviewed, who believed that the programme was going to improve the quality of teachers work at the basic education level, especially in the rural areas (TED/GES, 2010). However, it is still too early to evaluate if these teachers will remain in the basic education.

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<sup>16</sup> Phase 1: 3 Northern Regions and Afram Plains; Phase 2: Ashanti and Brong-Ahafo; Phase 3: Eastern, Western and Central and Phase 4: Volta and Greater Accra.

<sup>17</sup> The evaluation recently concluded was based on analysis of documents and curriculum materials, survey of trainees using a sample of 610 teachers (2%), interviews in 3 TTCs, focus groups and classroom observation.

<sup>18</sup> According to MoE interview total enrolment of students in distance education programmes increased from 22,819 in 2007/2008 academic year to 31,994 in August 2009 (40% more) and currently 26,831 untrained teachers are receiving training under the UTDBE.

<sup>19</sup> As part of the evaluation, classroom observations were conducted in Ashanti and Central Regions with teachers undergoing training in the UTDBE programme and teaching in public basic schools and teachers who had no training mostly teaching in private schools.



The performance data based on trainees' first year examination records suggests that overall most of the UTDBE trainees performed well enough to merit enrolling on the diploma programme (TED/GES, 2010). However, considering the timeframe and the teachers targeted, the UTDBE curriculum was felt as over-ambitious and not sufficiently differentiated to trainee needs and profile. According to the evaluation survey, most trainees found the study materials difficult to understand and questioned the relevance of the content, felt as not sufficient oriented towards opportunities for classroom application and reflection in practice. The need for the curriculum to be closely linked to the untrained teachers' on-going classroom teaching experience had already been identified in the MUSTER findings (Akyeampong, 2003).

This may partly explain the poor trainees' performance in first year examination for Phase 1 of the programme, with almost 20% of the trainees failing in all 8 courses and only 2% passing all courses (TED/GES, 2010). Although all trainees start on a Diploma route (the equivalent to the residential programme run by the TTCs), the GES then decided to create an alternative route for those who failed the first year examinations, by enrolling on a certificate 'A' programme. This has been seen as unfair and demoralizing to the ones who failed (TED/GES, 2010) and furthermore it defies the logic of the programme to promote equal professional development opportunities.

In terms of enrolment, a study of basic school teachers perceptions and attitudes towards teaching as a career in two deprived districts in Ghana found that for the case study districts<sup>20</sup> more than 40% of untrained teachers were not able to access the UTDBE as it only had a single intake and therefore increased their demotivation and lower school attendance (Thesis, 2010).

In terms of modes of delivery, the evaluation found that printed materials were the main instructional tool for the UTDBE and face-to-face meetings were the main space for learning, these have not worked to their full potential for trainees to explore self learning and reflective practice. The training philosophy still focused on a teacher-centred knowledge based approach to teacher development. In this ODL programme, the structure and methods of teaching somehow ended up replicating those of regular full time trainees in TTC, without building on the professional experience of the untrained teachers nor promoting a dynamic space for reflective practice.

Potentially this could have been facilitated if ICTs had been integrated into the programme delivery and although the initial idea was to apply an ICT-enhanced ODL approach, the evaluation found it did not materialize. As the study noted in contexts where ICT infrastructure is low, uptake of ICT-enhanced ODL approach to teacher education is unlikely, with the predominant and relatively cheap print-based pedagogical culture of teaching and learning. The lack of infrastructure to support the use of ICTs was already recognised during programme formulation, where a limited role was foreseen as a reinforcement of the central services (TED, 2004). In addition to support infrastructure, there is also the need to consider pupils readiness for the use of ICTs. The empirical evidence from a study on ICT integration in schools<sup>21</sup> has showed that ICT skills of teachers in Ghana are limited but the number of teachers using ICT is increasing as well as the opportunities to learn ICT and ICT integration (Boakye and Banini, 2008), which the UTDBE could build upon.

In terms of costs, the public spending on the UTDBE programme is relatively low as it is mainly limited to the costs of the face-to-face residential element of the programme. According to the evaluation study, average public cost from 2005-2010 was about 122.2 GhCedis (\$84) per trainee. This figure is only 5% of the average public cost on a regular trainee in the college of education for the same level of qualification which amounts to 2375,5 GhCedis, without considering college recurrent costs (TED/GES, 2010). In addition, under the UTDBE programme, the trainee continues to teach in a school while participating in the programme so the government has no additional cost in finding a replacement cover for those in training.

However, the private costs of the programme are significantly higher, on average 315 GhCedis per year (9 times more than the public cost) as the trainees are responsible for the bulk of the costs including the study materials, boarding and lodging at the residential meetings, examinations and travel costs. As showed in the evaluation survey results, these private costs are seen by pupil teachers as an obstacle to conclude the

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<sup>20</sup> Two thirds of untrained teachers in Ponkujaku and one third in Aumisoee were not currently participating in the programme when the research was conducted between 2007 and 2008 (thesis, XXX).

<sup>21</sup> This was part of a major study on ICT integration in schools in West and Central Africa using the case study approach. For Ghana the sample was composed by 10,000 students and 500 teachers (no specification if qualified or unqualified teachers).

training, with 93% of the surveyed trainees referring having difficulties in paying the cost involved, especially considering the usually low pupil teacher salary. Overall drop out figures were not available but in a study of two deprived districts in Ghana a third of the enrolled participants dropped out due to financial constraints (Thesis, 2010).

In order to reduce the programme costs, the evaluation describes the possibility to reduce the face-to-face meetings and simplifying the course materials and modules in line with trained professional practice. Although implying high start up costs, another alternative is to use low-tech ICTs to provide some of the content for learning to allow for more dynamic training and improve its relevance to trainee backgrounds, with lower public and private costs in the long term. Some trainees are accessing loans from NGOs. The issue of distant teacher education programmes requiring trainees to pay high costs has also been raised by the teachers unions who advocate for special student loans to be available to students as they are overloaded with teaching, studying and paying the costs of travel and tuition (Akyeampong and Asante, 2005). Indeed, from an equity reasoning, the UTDBE programme requires further changes in the teachers development system so that untrained teachers enjoy equivalent professional development opportunities as the qualified teachers (at present they are excluded from the government study leave system and do not receive state support during the in-service training, etc.). Still on costs, if many untrained teachers upgrade the qualifications in a short time, the teacher salary budget will also have to increase (Akyeampong, XXX)

As the evaluation study concludes, this innovative approach to teacher education in Ghana should be further explored as the costs are relatively low and addresses the problem of teacher shortage especially in rural areas while allowing increasing the number of qualified teachers by upgrading untrained teachers through distance learning. However, a number of teacher education development schemes have been introduced in the past but failed to go to scale or to be sustained (TED, 2004) and therefore there is a need to increase the efficiency of this distance learning programme if to be successful. Some of the recommendations from the evaluation include the revision of UTDBE materials to adapt to trainees practical knowledge; provision of remedial courses in subject content knowledge to upgrade trainees knowledge on the subjects; starting all trainees on one level before differentiation according to the ability, interest and achievement on basic knowledge tests at the end of their first year; diversifying the medium of delivery including the use of internet, workshops and seminars to provide space for reflection and professional learning; improve library facilities and structure programmes.

The evaluation goes further to suggest policy considerations to extending the UTDBE model to cover the training of all prospective teachers thinking of enrolling on the regular colleague of education programme. In this case there would be a transfer of costs from the expenses with regular trainees to loans for the UTDBE type trainee, reducing the overall public costs of training the teacher for basic schools. However, in order to be attractive for prospective teachers, this expansion would require the improvements in the incentive and support structure for the UTDBE as discussed above.

The UTDBE is an innovation in Ghanaian teacher education and the final effects are not yet known. So far it seems that the programme is enhancing the quality of the teaching force. If these new qualified teachers remain in the profession and in the rural areas, the programme will be contributing to improve the access to quality basic education by the most disadvantaged and marginalised populations but more time is needed to assess the real impacts of the programme. As observed, the current programme provides qualifications but not necessarily promotes higher career aspirations and therefore it might continue to be used as a way to move in the education system (Thesis, 2010).

From the evaluation it became clear that a number of concerns expressed need attention. While upgrading and qualifying untrained teachers using an open and distance learning approach, and before expansion, the UTDBE programme needs to be improved, building on the professional experience of the untrained teachers to enhance the quality of teaching and to ensure that it provides the appropriate qualifications. The private costs of the programme also need to be addressed, as currently might be affecting access and completion as to ensure its efficiency. One possibility could be the availability of loans for untrained teachers to have the opportunity to enrol and complete the programme (Thesis, 2010). In the 2010 budget statement Government announced that effective teachers in rural areas who are pursuing distance education will benefit from GH¢100 government subsidy annually. Science and Mathematics teachers will continue to enjoy three incremental credits on their respective ranks (MoFEP, 2010)

The UTDBE also needs to be complemented by structural changes to the conditions of teacher service and to further make use of open and distance learning approach methods. Untrained teachers are a major teaching force at the basic level and other measures should take place to make them feel appreciated and encouraged them to work as part of the education service (Thesis, 2010)

As per the teacher demand and supply forecasts conducted in 2007 for the GES, it is expected that in-service upgrading of unqualified teachers will continue to be needed (Perry, 2007) and an improved UTDBE may be fundamental to meet the aspirations of FCUBE and the EFA objectives by using the already existing available teachers in the system.

#### **1.4. Conclusions**

Since independence and despite the many political changes, Ghana has maintained a high commitment to the educational development of the country translated in several education reforms. A consistent policy agenda in these reforms has been the attempt to make basic education free and compulsory (Akyeampong et al., 2007), with a strong political will reflected in Ghana setting ambitious goals to achieve Universal Basic Education.

The education reforms of 1987, the FCUBE and further reforms, in particular the capitation grant have contributed to a significant expansion in terms of educational access. Yet questions remain in terms of how to sustain the gains in enrolment and universalize basic education for all (Akyeampong et al., 2007). These reforms have clearly benefited from substantial investments from donors but such a strong involvement by the donor community in Ghana's educational developments raises issues regarding the ownership and sustainability of the reforms. Moreover, in the past there has been lack of coordination and conflicting aid policies which have limited the effectiveness of implementation. With the latest round of Education Reforms in 2007 collaboration with donors will continue as they intensify their efforts to support countries in meeting the MDGs, including universal primary education (Bown, 2009).

Although considerable progress has been made in decentralizing responsibility and authority within the educational system, there seems to be limited participation by districts, schools and teachers in the reform processes in terms of policy and implementation (Agbemabiese, 2007).

Despite significant progress in the quantitative expansion of basic education, critical challenges to the education sector persist, with wide regional disparities and gender educational gaps remaining, affecting particularly the northern part of the country where high levels of poverty persist. One of the main lessons from the reforms as been that continuing the policies for expansion without improving the quality of activities at school level will not be effective. This echoes the global EFA agenda whereby governments and development agencies have been giving priority to improving access to schooling and although this remains a big concern, there has been a shift towards reducing dropouts and improving acquisition of basic literacy and numeracy skills, which depend crucially on improving the quality of the learning process, potentially the most difficult challenge in reaching EFA (WB, 2009).

While the education policies have been clearly focusing on expanding basic education in the country, teacher education reforms only emerged later, as a response to the problems that resulted from the rapid expansion (Akyeampong, XXX). Therefore, in the past, policies on teacher education have been somehow fragmented and incomplete and there is limited information available regarding their specific impact as they were not systematically introduced.

With the challenges associated to education expansion, more relevance has been placed in the development of the country's human resources as the strategy to achieve the GPRS growth and wealth objectives. The GoG estimates that approximately 25% of its entire budget is spent on teachers (MoESS, 2008) and there is a need to invest in continuous teacher development in order to ensure competent and dedicated teachers which can improve the quality of teaching and learning at the basic education level.

According to the projected teacher needs, Ghana has a relatively moderate teacher gap to reach the MDGs. Yet this hides disparities and inefficiencies in teacher development, deployment, retention and equity in the profession, as analysed in the Section 3 of this case study.

In addition to the policy lessons and recommendations explored in the policies analysed in this case study, some additional general remarks from the evidence gathered.

- At the system level, priority must be given to strengthen implementation of redeployment strategies for more effective allocation and use of teachers. This would allow to reduce the variation in pupil-teacher ratios across schools and to reduce absenteeism among teachers (WB, 2009);
- Increase participation of all stakeholders in the policy making and strategic planning processes within the education sector as well as encourage community level participation in the policies implementation and management and delivery of education provision;
- Need to consider the methods of teacher recruitment and access to TTCs and the incentives to make teaching attractive especially at the primary level;
- As part of retention strategies, greater emphasis can be placed on continuing professional development programmes provided through structured INSET, while taking into account the professional needs of those who are already qualified to teach and where the government has already made an investment (Cobbold, 2007);
- An official induction and mentoring programme for beginning teachers should be designed and implemented to assist new qualified teachers and encourage them in remaining in the profession;
- Education decentralization structures to be further developed in order to strengthen decentralised teacher management and allow for tailored solutions addressing the problem of supply and demand at district level (Akyeampong, XXX);
- Teacher education reform needs to be developed and revisited in parallel to policies on educational access expansion to ensure an adequate supply of teachers.

The whole education system depends on the dedication and professionalism of teachers, without whom there will be no motivation for pupils to continue in school and no possibility to improve in the quality of education (Bown, 2009). The recent development of an overarching policy framework regarding teacher development is an encouraging step to bring together a comprehensive teacher education plan to increase the efficiency and effectiveness in planning.

The above findings and lessons learned from the Ghana case study potentially can be relevant and used in other contexts with similar characteristics. Yet, the unique factors of Ghana have been determinant to the current outcomes and therefore one needs to take this into consideration when implementing similar approaches to educational development that is more appropriate than others in any given country context (Okugawa, 2010)

There is a need for further research focusing on the views of those involved in the programmes, as well as views of officials in local education authorities and those actually in and around schools (e.g. head teachers, teachers, school management committees, parent teacher associations (PTAs) and communities (Okugawa, 2010). Considering there is very limited information available, another area for further study are the reasons for and implications of the failure to achieve FCUBE and evaluating all the recent policies on teacher training, deployment, motivation and retention.

Teacher development in Ghana needs to be further explored in order to inform policy-makers and education reform and build on the momentum for developing an efficient, quality and sustainable education system that will allow realizing Ghana's aspirations to become a middle-income country by 2015.

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## **2. Chapter two: case study of Nigeria**



## Introduction

Nigeria launched its Universal Basic Education (UBE) drive at the end of 1999 – just prior to the international launch of the EFA goals in Dakar 2000. The Government of Nigeria (GoN) introduced the Compulsory, Free, Universal Basic Education Act 2004 to demonstrate its political will to educate its citizens, as well as meet EFA goals relating to access, equity and equity in education. While enrolments have risen, severe challenges remain to redressing persistent inequalities and low quality that is rife across the Nigerian education system. Teacher education still constitutes a major hurdle to achieving EFA goals in Nigeria as *“the calibre and the quality of persons recruited into teaching and teaching education programmes may not be able to see the nation to the promised land of Education for All”* (Kolawole and Olusoa, 2010, p44). This case study reviews teacher education policies introduced in Nigeria since the lead up to UBE to and their impact on increasing quality, equity and access in education.

## 2.1. Methodology

### 2.1.1. The aim of the study and the Nigerian context

The aim of this case study is to provide an analysis of the efficiency and effectiveness of policies and practices instituted to address the teacher gap in achieving EFA in Nigeria. Specifically in the Nigerian context, this case study analyses policies related to teacher education, deployment, recruitment and their impact on quality, equity and access<sup>22</sup> to education. Nigeria was selected as a case as it is the most populous and ethnically diverse countries in Sub-Saharan Africa, with over 354 languages. Nigeria holds a key position in oil and gas production in Africa. Nigeria is a federal country where each state has its own education system, which suggests that policies may be interpreted and deployed differently by individual state governments. The decentralisation of education in Nigeria and issues emerging from it make understanding policies surrounding teacher education an interesting topic, and relevant for other countries in the process of or having decentralised educational services.

### 2.1.2. Data collection

As this study is a desk-based review, an extensive review of literature was conducted to support the analysis. The review had a focus on polices that aim at improving quality, access and equity in education implemented both prior and post-EFA agreements in 2000. The review includes the following documents:

1. Government publications on teacher education policies and programmes, including legislations, green papers, white papers, country reports and education plans and review. These documents were obtained from the website of the Federal Ministry of Education and international donor websites.
2. Published journal articles and conference papers that discuss teacher education in Nigeria. These are obtained from the donors' websites or specialized.
3. National media and news papers that address government policies on teacher education and the reaction of the politicians and educators in the country.
4. Non-academic documents from international agencies, including the World Bank, UNESCO, UIS amongst others.

### 2.1.3. Limitations

While the review is as accurate and comprehensive as possible, the study has several limitations:

1. A lack of clear measurements or indicators of efficiency and the effectiveness of the policies or programmes implemented by government. This hindered the ability to establish cause-effect relationships, and measure the influence of government policies on teacher education and educational indicators of quality, equity and enrolments.

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22 Within the case study the following definitions are used:

- a) *Access*: strategies to increase physical access to schooling for all, and to increase the number of teachers;
- b) *Quality*: impact on learner achievement (measured predominantly through test scores) and increase in the quality of teaching;
- c) *Equity*: the extent to which policies sustainably and materially improve the conditions and life chances of the marginalised, and ensure greater representation in the teaching force from marginalised groups.

2. Nigeria has 'national data challenges' (UNDP, 2009. p. x). Inadequate EMIS systems mean that baseline data on enrolments, number of teachers in schools, teacher qualifications and remuneration are often incomplete or lacking, This makes drawing conclusions on impact even more difficult.

## 2.2. The Nigerian Education System

### 2.2.1. Country context: Nigeria's ethnic and socio-economic profile

Nigeria is an incredibly diverse country. The population is around 150 million, over half of whom live in rural areas (UNESCO 2010). There are over 250 ethnic groups throughout the country, the largest of which are Yoruba, Fulani, Hausa and Igbo, which account for 68% of the population (Centre for Educational Technology; CET, 2009). Half of the population are Muslim and live mainly in the north, 40% are Christian and live mainly in the south and 10% hold indigenous beliefs and are scattered across states (CET, 2009). Nigeria is divided into 36 states, grouped into six geopolitical zones and run by a Federal Government in the Federal Capital Territory (FCT) Abuja. With such heterogeneity, Nigeria continues to experience ethnic and religious tensions.

Nigeria gained independence after World War II in 1960. Following nearly 20 years of military rule, a new constitution was adopted in 1999, which peacefully changed the regime to a civilian government. The agriculture and oil industries dominate, as Nigeria is the 5th largest oil producer in the world and together these industries account for over 60% of GDP (UNDP, 2009). Nigeria economy experienced significant growth between 2001 and 2008, at 6 percent annually 'until the current global economic crisis began to affect the economy seriously towards the end of last year [2008], the country had achieved unprecedented macroeconomic stability' (UNDP, 2009, p. ix). Despite the high revenue from oil and consistent economic growth throughout most of the last decade, Nigeria remains among the 30 poorest countries in the world (CIA, 2010); 65% of the population live below the poverty line of \$1.5 a day (DfID, 2010). The Federal Government faces the daunting task of reforming a petroleum-based economy, whose revenues have been wasted through corruption and mismanagement (*ibid*).

Nigeria is a lower-middle-income country (World Bank, n.d.) and ranks 142<sup>nd</sup> in the Human Development Index (HDI; UNDP, 2010). Pro-poor policy initiatives implemented by the GoN have led to increases in HDI indicators from 0.490 in 2004 to 0.513 in 2008, which if maintained are expected to allow Nigeria to rise into the category of 'middle HDI countries' (UNDP, 2009). Nonetheless, the country continues to face severe inequalities, and only 20% of the population own 65% of national assets (UNDP, 2009). Table 2.1 below outlines inequality trends by zone in Nigeria.

Table 14.1: Inequality Trend by Location and Zones

	1985	1992	1996	2004
<b>National</b>	0.43	0.41	0.49	0.488
<b>Sector</b>				
Urban	0.49	0.38	0.52	0.544
<b>Rural</b>	0.36	0.42	0.47	0.519
<b>Geo-Political zone</b>				
South South	0.48	0.39	0.46	0.507
South East	0.44	0.40	0.39	0.449
South West	0.43	0.40	0.47	0.554
North Central	0.41	0.39	0.50	0.393
North East	0.39	0.40	0.49	0.469
North West	0.41	0.43	0.47	0.371

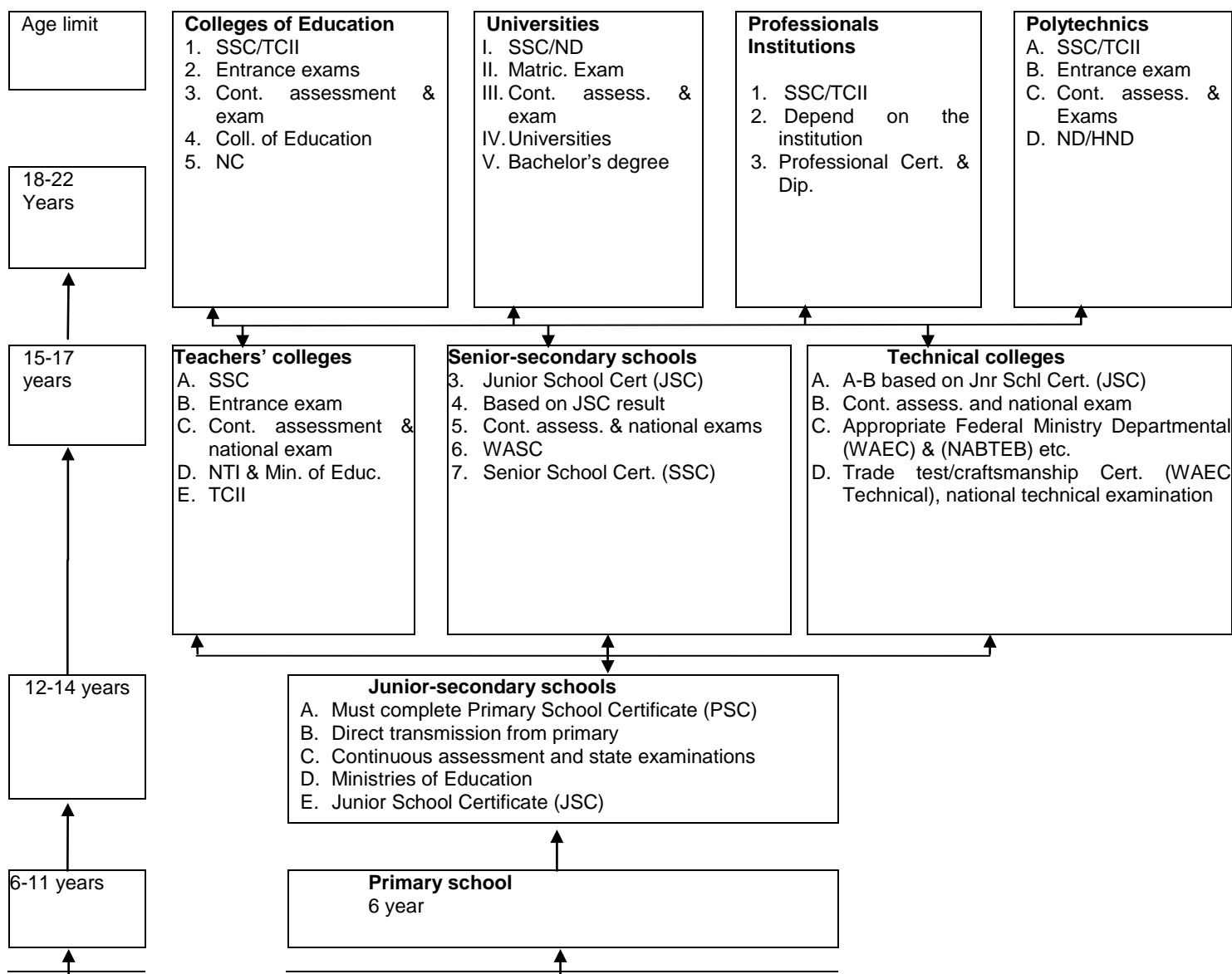
Text 1: Source: National Bureau of Statistics, 2004, in UNDP, 2009, p48

The table clearly indicates the inequality cross states, which has not only increased in most provinces, but seen a particular rise between 1996 and 2004. This indicates that in spite of overall economic growth, wealth in Nigeria is being unevenly distributed, and the most disadvantaged groups fail to benefit from increases in income. Inequality is also prevalent throughout the education system, which is discussed further in the following section.

### 2.2.2. Structure of the Education System

There are more than 566,000 teachers teaching nearly 20 million children in over 49,000 primary schools across Nigeria (UNESCO 2010). The 6-3-3-4 system was introduced in 1981 and is made up of 6 years of primary school; 3 years of junior secondary school; 3 years of senior secondary school, and 4 years of university education, leading to a bachelor's level degree in most fields. School starts officially at the age of 6 and ends at 18. Primary education caters for students from 6 to 12 years old, junior secondary 12 to 15 years old and senior secondary 15 to 18 years old (see figure 2 below for an overview of the Nigerian education system).

Figure 1.1: Structure of the Nigerian Education System



0-5 years

**Pre-primary schools**  
A - Age 0-5 years  
B-D. Not Applicable

Source: Aderinoye 2007

Since decentralisation of the education system, each level of education is administered by different tiers of the government. According to the Nigerian constitution, local governments run primary education, state governments secondary education (except 'unity schools' which are run by the federal government), and higher or post secondary education is managed jointly by the federal and state governments (FME, 2009).

### 2.2.3. Education Policy Frameworks

The education system has gone through different policy changes overtime. The Federal Ministry of Education (FME) is the government body responsible for establishing education national policies and guidelines, which are protected by various statutory instruments such as the National Policy on Education, the Education Decree No. 16 of 1985 and the 1999 Constitution of the Federal Republic of Nigeria (FME, 2009). Federal policies regarding education are focused on six themes: Early Childhood Education, Basic Education, Secondary Education, Tertiary Education, Adult and Non-formal Education, and Special Needs Education (*ibid*). The right for every child to tuition-free primary education is guarded by the National Policy on Education and has led to an increase in child enrolment and the number of educational institutions, particularly in the public sector (FME, 2009).

Teacher shortages and the quality of teaching are issues that have received distinct attention from the Federal Government and been addressed in recent government policies on education. The "10 Year Strategic Plan" addresses the issue of teacher quality and its relation to equity in various places. The "Roadmap for the Nigerian Education Sector" (FME, 2009) also details policies for teacher education (see Appendix 2.6.2 for an overview).

### 2.2.4. Access, Equity and Quality of Education

Education, like other public sectors in Nigeria, has suffered long periods of financial neglect. However, in recent years the budgetary allocation to education has increased steadily; from 7% in 2003 to 11% in 2006. These figures excluded funding for UBE and the Education Trust Fund (ETF) (Federal Republic of Nigeria (FRN) 2005). There is considerable political will to meet EFA and MDG goals, and the Nigerian Government has succeeded in making progress towards several goals, as outlined in Table 2.2 below.

Table 15.2: Impact of Educational Reforms

Table 6.8: Impact of Reforms-Education							Progress Towards Target
	1990	2000	2004	2005	2007	2015	
Net Enrolment	68	95	81.1	84.6	89.6	100	Good
Pupils Starting Grade 1 who reach Grade 5	67	97	84	74	74	100	Good
Primary Six Completion Rate	58	76.7	82	69.2	67.5	100	Fair
Literacy Rate of 15 - to 24 - Year - Old		64.1	60.4	76.2	81.4	100	Good
Primary School Enrolment by Sex							
Sex	1990	2000	2004	2005	2007	2015	
Male	7.1	10.73	12.08	12.38	15.53		
Female	5.5	8.43	9.49	9.72	11.62		Improving
Total	13.6	19.16	21.58	22.1	27.15		

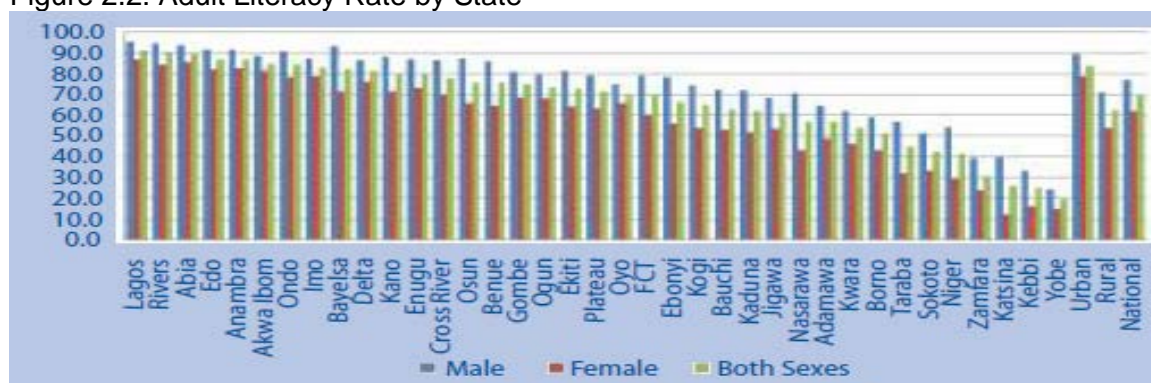
Source: Report of the Midpoint Assessment of the MDGs, 2008.

Source: UNDP, 2009, p114

The table clearly shows that impressive progress has been made in increasing enrolments and retaining students at the primary levels, but that gender parity indicators continue to lag behind. In addition, the severe constraints to data collection and lack of an efficient EMIS system mean that these figures must be considered with caution as they may not reflect the situation in the hardest to reach areas.

The Nigerian education system remains crippled by chronic inequalities, outlined in Figure 2.2 below.

Figure 2.2: Adult Literacy Rate by State



Source: NBS, general Household Survey, 2007, in UNDP, 2009:50

Educational outcomes vary between states, as is evident in the rates of illiteracy between states. The overall figure of sixty eight percent of the total population aged 15 and above that can read and write (male: 75.7% and female: 60.6%), masks vast differences between states. Of the 40 million illiterate adults in Nigeria; only 500,000 are enrolled in formal educational programmes (NDHS, 2008). Data on educational attainment for females and males per household shows that overall females are less likely to have ever attended school (NDHS, 2008, p33). Around twenty percent of the population have some primary education (21% of males and 19% of females), but gender disparities widen at higher levels of education (FME 2009), and between quintiles (as outlined in Table 3 above). The proportion of males completing primary education is 12 %, compared with 11 % of women, and 15% of men have completed secondary education, compared with 10 % of women (NDHS, 2008). Urban-rural differences exist in educational attainment (FME 2009). 22% of males in urban areas and 11% in rural areas have completed secondary education, compared with 18% of females in urban areas and 7% in rural areas. 49% of females and 35 % of males in rural areas have no formal education. In urban areas, 22% of females and 14% of males have no education (NDHS, 2008). The proportion of the population that has attained any education varies between Nigeria's geopolitical regions (NDHS, 2008). The North West and North East have the highest proportion of people

with no education while the South has the lowest percentage. The South West has the highest proportion of females and males who completed more than secondary education.

FME (2009) statistics show that wide disparities exist between the expected and actual enrolments in education. Out of 35 million children of official school-going age, only 24.42 million students are enrolled in primary education and 6 million of the 9.27 million children who should be enrolled in junior secondary are out of school. Therefore the number of students benefiting from UBE is only 27 million; and a further 17 million remain without or with incomplete compulsory education (see Figure 1.1). The gross enrolment ratio (GER) across all levels of education combined (except pre-primary) was 51% in 2007 in comparison to 55% in 2005 and 2006. The overall net gross ratio (NGR) for primary schools is 62% with a gross attendance ratio (GAR) of 84% (NDHS, 2008). The Net Attendance Ratio (NAR) in urban areas is 74%, which is high in comparison to 57% in rural areas. The GAR is also higher in urban areas than in rural areas (98% and 79% respectively). There is a slight difference in the NAR between males and females at the primary school level (65% and 59% respectively). Males also show a higher GAR at the primary school level (89%) than females (80%). The GAR and NGR show significant variation at the zonal level. The South East (110% and 83%) is highest while the North West is lowest (59% and 43%).

This data indicates gender disparity in education, as well as significant differences in the level of education between urban and rural areas. Also, it suggests cultural and religious influences on education, highlighted by the differing levels of education between the northern states and southern states. Therefore Nigeria has made progress in increasing enrolments, but still faces severe challenges to quality and equity in education.

### **2.2.5. Teacher education**

The National Policy on Education states that teacher education should provide teachers with the intellectual and professional grounding to prepare them for their profession and make them adaptable to changing situations (FRN, in Agwagah and Usman 2002). The teacher education system in Nigeria is divided into pre-service and in-service training. Pre-service teacher education (PSTE) is provided by Colleges of Education and universities. Colleges of Education normally prepare teachers for the Nigerian Certificate in Education (NCE), which since 1998 is the minimum qualification for teaching under UBE at primary, junior secondary and technical colleges (Aderinoye 2007). University graduate teachers with a Bachelor of Education (B.Ed) teach in senior secondary schools (Ogonor and Badmus 2006).

The National Teachers' Institute (NTI) also contributes to teacher training by offering distance pre-service and in-service teacher training. The NTI teacher training includes top-up or upgrading programmes as well as different diplomas through distance learning modes (World Bank 2001). Unlike the NTI, University Institutes of Education offer conventional in-service teacher training (ISTT) programmes on a full or part-time basis in addition to pre-service training. These different types of teacher training programmes demonstrate the GoN is taking a varied approach is being taken to teacher education, with the aim of providing the education system with a large number of good quality teachers (Durosaro 2006).

Teachers are a valuable asset and without enough teachers achieving the MDG and EFA is doubtful. The number of students enrolling in primary education is growing. The school age population has grown from 358, 1488 in 1999 to 4,339,235 in 2009 (UNESCO 2010). However, the population of teachers has not grown rapidly enough to keep pace. In Nigeria there are 22 federal teacher-training colleges, 38 state teacher-training colleges and four private ones (Aderinoye 2007). Colleges of Education (CoE) can be part of universities, polytechnics or affiliated with either of them. Admission to CoEs is based on Joint Admissions Matriculation Board (JAMB) administered entrance examinations combined with results from secondary or vocational schools.

Despite minimum academic requirements for teachers to enter the profession, the high demand of UBE and severe shortage of teachers in the country mean that the implementation of NCE policy has remained suspended and people have been joining the teaching career with lower qualifications (USAID, 2003). Teachers with Grade Two Teacher's Certificate (TCII) are still allowed to teach under the UBE programme. Possession of any of the following qualification serves as the entry requirement to any of the teacher-training programmes: Junior Secondary School (JSSIII), Senior Secondary School Certificate (SSCE), or Arabic School Certificate and the City and Guild certificate. Upon successful completion of these

programmes, graduates are awarded a TCII certificate. Candidates possessing these certificates may proceed on to the NCE, or to university to pursue an academic programme (Aderinoye 2007).

The NCE, which is regarded as a non-degree teaching certificate, is awarded by CoEs upon successful completion of three years full time post secondary studies. When a NCE holder wishes to teach at the senior secondary level, they must pursue a B.Ed which requires a further three years study of a single subject at university (Osuji 2004). Single subject bachelor degree holders can also join the teaching force at senior secondary level after obtaining a one-year Teaching Certificate Diploma which includes pedagogical skills and specific subjects in order to help students link between theory and practice and draw close professional links between have been taught in the universities and the secondary schools setting where they are prepared for. In addition, students are required to do six weeks of compulsory teaching practicum before they obtain their B.Ed (Ogonor and Badmus 2006).

The B.Ed programme is more appealing to students than the NCE, which results in Universities having insufficient places for candidates seeking admission, while CoEs have difficulty getting enough candidates (FRN, 2005). CoE have therefore lowered their entry requirements to three credit level passes instead of five, which remains insufficient to overcome the paucity of applications for teacher education, particularly at NCE level. As a result, Colleges admit a large percentage (75.28%) of students through the pre-NCE mode (FRN 2005), which is a further indication that teachers entering colleges have lower academic results, which may have a negative impact on the quality of teachers graduating from CoEs.

Teacher education curricula includes four major topics: Educational Foundation courses, Subject Specialized courses, General Studies and Teaching Practice. Educational Foundation course curriculum includes subjects such as Administration, Planning and Organization of Education, Teaching Aids and Educational Technology; Developmental Psychology; Guidance and Counseling; Testing and Measurements; History of Education; Comparative education ; Sociology of Education and Philosophy of Education. Subject Specialized courses could be in any of modern languages, vocational studies, Basic sciences or Applied sciences, Home science, Food technology, Building technology, Social Studies and practical teaching (Durosaro, 2006, p48). At the end of the period of theoretical study, students undertake 2 weeks of practical teaching; which has been identified as a weakness in the initial teacher training programme and needs to be prolonged to at least 24-28 weeks (FRN 2005).

The National Policy on Education considers teachers the main element for developing the country, and teacher education is considered an important process for developing well-skilled teachers who can provide good quality, relevant education. The goals of teacher education in Nigeria are:

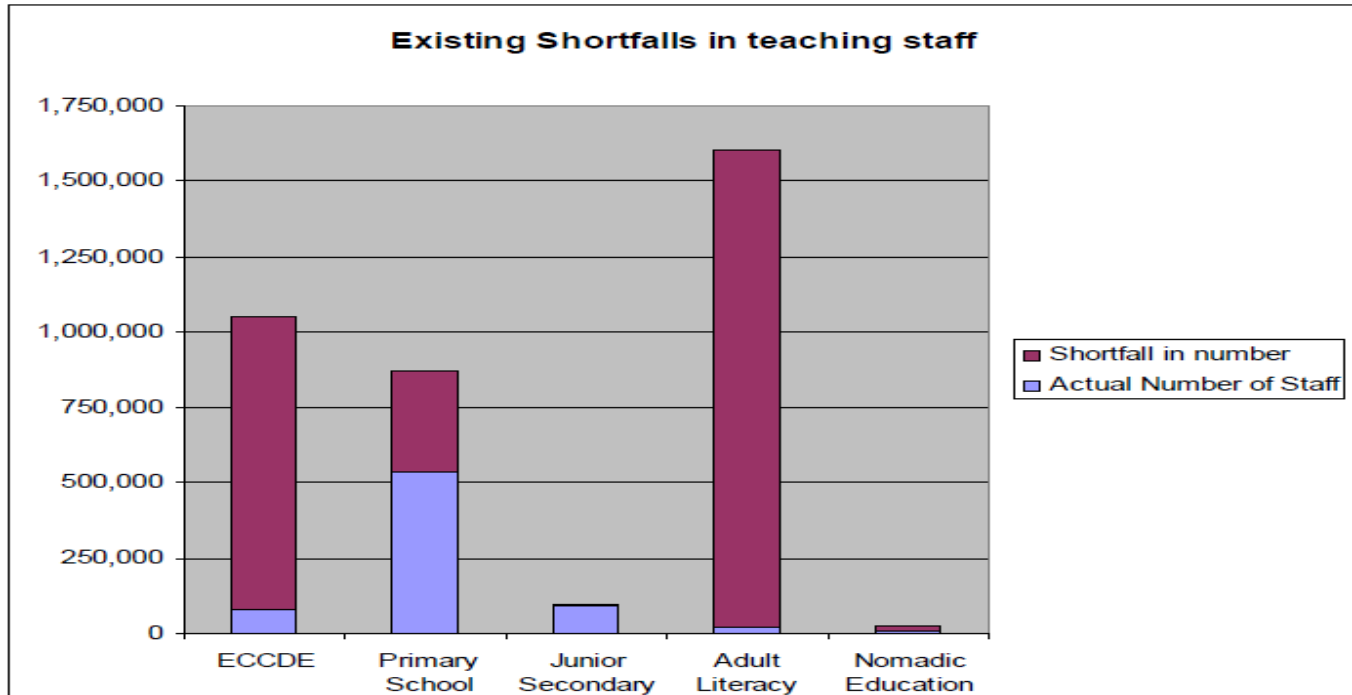
- a) *production of highly motivated, conscientious and efficient classroom teachers for all levels of our education system;*
- b) *encouraging the spirit of enquiry and creativity in teachers;*
- c) *helping teachers fit into the social life of the community and the society at large and to enhance their commitment to national goals;*
- d) *providing teachers with the intellectual and professional background adequate for their assignment and to make them adaptable to changing conditions and;*
- e) *enhancing teachers' commitment to the teaching profession*

(FGN, 2004, p47)

Data from the National Steering Group shows a steady increase in the number of teachers in primary education from 423,711 in 1999 to 591,041 in 2003 (FRN, 2005). In 2009 the FME estimated the teacher shortage in primary education at 538,177 teachers (Figure 2.3). The majority of shortages (70%) are concentrated in the North East and North West, and there is a large number of under-qualified teachers (38.75%) teaching at rural schools (FME 2009). The major challenges facing teaching are "*the inadequate number of qualified teachers, with a large number of Grade II teachers and secondary school leavers teaching; uneven distribution of teachers between urban and rural schools; poor remuneration and motivation and low teacher support*" (FME, 2009, p27). The teaching career is neither able to attract the

best students in the country, or reach marginalized populations. Those who enrol in teaching programmes are usually applicants who have been unsuccessful in applying to other university programmes, and for whom teaching is a last resort. Following enrolment, many graduates seek alternatives to teaching, due to low salaries and social standing of teachers in Nigerian society (Adelabu, 2005, p8).

Figure 3.3: Existing Shortfalls in Teaching Staff.



Source: FME 2009: 2

The draft of National Teacher Education Policy (2008:7) details aspects that need to be a focus in teacher education. These include:

- *The use of standards in the design of teacher education programmes, with a focus on outcomes and teacher performance.*
- *The recruitment of capable candidates.*
- *The training of teachers both in subject mastery and subject-based methodologies.*
- *Linking pre-service and in-service teacher education curricula and programmes.*
- *Improved conditions of service.*
- *Recognition of prior learning or experience in professional development programs and advancement decisions.*
- *Introduction of reward system for hard working teachers*
- *The provision of increased opportunities for training and support of teachers on an ongoing basis, especially at the local or school level.*

The draft also outlines key principles to be followed in order to reform teacher education, and achieve the above stated objectives. Among these principles are (see Appendix 2.6.1 for further details):

- A. Initiating attractive incentive programmes in order to attract competent people into teaching profession.
- B. Ensure an efficient, supportive and constructive supervision that helps produce successful student teachers. This can be attained through successful implementation of the following factors:



I. *Teaching practice*

II. *Induction*

III. *Certification and Licensing*

- C. Ensure that teachers are kept motivated through providing genuine in-service teacher training opportunities that allow them to continue their professional development, and career advancement and improvement. That could be achieved through:

VI. *Up-grading Programs (Certification)*

VII. *Continuing academic and professional development (CPD)*

- D. Ensure that teachers are constantly updating their knowledge and their tools need for performing their jobs as well as relevant in a rapidly changing world.

These policies are comprehensive, as they incorporate key elements of both PSTE and ISTT teacher training. They also detail the standards in which these programmes should be implemented and evaluated. The lifelong element of teacher development is also discussed, as policies promote ongoing professional development that endorses rewards for hard working teachers in recognition of their efforts. These policies have been emphasised further in one of the turn-around strategies in “*Roadmap for the Nigerian Education Sector*” (FME 2009: 22) which includes issues of recruitment, promotion of teaching career and teachers’ incentive. The UBE initiative is expected to achieve a number of 124,696 care-givers for ECCDE, 797,166 teachers for primary education and 110, 177 teachers for junior secondary by 2011 (FME 2009).

### 2.3. Policies and practices to address the teacher gap for EFA in Nigeria

“*In recognition of the pivotal role of quality teachers in the provision of quality education at all levels, teacher education shall continue to be emphasized in all educational planning and development*” (National Policy on Education, 2007). Several programmes and initiatives have been introduced in response to government policies, to encourage people to join the teaching career, and Government bodies (Universities, Colleges of Education and NTIs) have provided an increasing variety of in-service programmes to improve the quality of teaching and learning in schools. This section provides an overview of policies and programmes, the rationale for their introduction in Nigeria, and their impact on educational access, equity and equality. Table 2.3 below outlines the polices reviewed, and goal they most closely link to.

Table 16.3: Goals and policies reviewed in the case study

Government objective/EFA goal	Policies/ practices
Policies to increase quality	- Upgrading qualifications through formal and non-formal education programmes
Policies to improve access	- Teacher recruitment and deployment strategies to increase the number of qualified teachers, in particular in rural areas - Increasing the number of female teachers in rural areas to increase girls' enrolment in schools - Non-civil service teachers to close the teacher gap

As is the case in many sub-Saharan African countries, the problem of inequality in education undermines efforts to meet EFA goals related to quality and access. Therefore equity is analysed as a central theme that cross-cuts each area of policy analysis, rather than as a separate issue. It should also be noted that while the policies have been divided according to their overarching focus on quality or access, many have overlapping objectives that aim to impact on both areas. For example distance education programmes analysed under Policy 1 have a focus on increasing the quality of education by upgrading qualifications, but also on making increasing access by making programmes more widely available and redressing gender inequalities.

### 2.3.1. Policy 1: Upgrading qualifications

The GoN has implemented several programmes to upgrade teacher qualifications, in hopes of mainstreaming teacher qualifications and improving the quality of education. This section analyses three areas of reform: 1) the “Pivotal Teacher Training Programme” (PTTP), 2) in-service teacher training (ISTT) and 3) distance education and training.

#### **The “Pivotal Teacher Training Programme” (PTTP)**

When UBE was introduced in 2000, the Federal Government realized the need for more qualified teachers and urged the NTI to initiate a shorter cycle of teacher training programmes called the “Pivotal Teacher Training Programme” (PTTP). PTTP allowed senior secondary graduates to join for a duration of 18 months (Theobald *et al* 2007). The programme was entirely funded by the Federal Government for all Nigerian states. However, inefficient recruitment procedures and tiered levels of bureaucracy prevent teachers from being recruited effectively into schools, which was further hindered by the decentralised nature of educational governance. Decentralization of education is meant to increase the efficiency and effectiveness of educational management as well as transfer the responsibility for educational decisions away from the Federal Government (UNESCO 2005). However, the issue of recruiting qualified teachers in primary education has generally been badly executed (UNESCO 2006a).

Primary education was formerly run by the central government through the National Primary Education Commission (NPEC), which was renamed Universal Primary Education Board (UBEB) in 2000. UBEB was responsible for paying teachers’ salaries, distributing textbooks and school furniture and allocating resources through the State Primary Education Board (SPEB) and Local Government Secretaries (UNESCO 2006). Since the decentralisation of education in Nigeria, different tiers of the government (federal, state, and local) are in charge of different levels of education. Constitutionally, each tier of government is responsible for the entire level of education; including teacher deployment and recruitment. State governments are expected to support the Federal Government in achieving EFA goals, especially UBE.

There are many tiers of bureaucracy involved in recruiting teachers; 772 Local Government Education Authorities (LGEAs) run primary schools through school headteachers. Recruitment and deployment of primary school teachers is a decision that headteachers should be able to practice to address teacher gaps in individual schools. However, in reality recruiting civil service teachers with a NCE remains the responsibility of state governments (Theobald *et al.*, 2007). Schools report the need for qualified teachers to LGEAs, who should be able to recruit and deploy teachers to schools. However, LGEAs cannot hire teachers without the approval of the SPEB, which further requires the approval of the State Ministry of Education, and does not always lead to a positive response. Several states have enforced recruitment freezes for teachers for over five years. The ability of LGEAs to improve primary education in their jurisdiction is seriously constrained by these regulations and policies (World Bank, 2008). This leaves many teacher vacancies unfilled in schools; an issue that negatively influences PTRs and the quality of education.

#### ***The impact of the PTTP***

The PTTP exemplifies how ineffective and competing bureaucratic systems prevent teachers from being effectively deployed. Of 32,318 PTTP graduates; only 56% were employed by 2003 (World Bank, 2008). Some states, especially in the south, refused to acknowledge PTTP teachers as qualified “We already have higher quality teachers than the north; why do we need this program?” and others simply refused to participate in the PTTP programme (USAID 2003:35), claiming that it was below the acceptable minimum qualification for entry into the teaching profession as approved by National Policy (UNESCO 2006). These states have legitimate reasons to reject the PTTP, believing that a fast-track programme has the potential to have a negative impact on the quality of education. Nonetheless, states that suffer teacher shortages might benefit from the policy in the short term. Therefore the main issue is not only of teacher shortages but also about harmonising of the decision-making process between Federal and State Governments.

The issue of teacher qualifications therefore extends beyond technical shortages, to the political willingness of state governments to address the gap of qualified teachers. In spite of widespread teacher shortages, unemployment among qualified teachers has risen: over half of the 5,057 teachers who graduated between 1998 and 2003 in 7 states were unemployed. Worryingly, in the same period PTRs in these states, often taken as proxy measures of the quality of education, reached an average of 75.5:1. The highest PTRs were

found in Yobe State (which also has the lowest adult literacy rates) with ratios of 111:1 and the lowest Sokoto State with a ratio of 52:1 (UNESCO, 2006). Constraints under the current decentralized education system force LGEAs to recruit unqualified teachers (World Bank 2008). Alternatively, LGEAs hire qualified teachers from outside their local areas on non-civil contracts with salaries far lower than government recruited teachers. This does not only mean the national PTR of 1:35 is unreliable, but also explains teachers' low morale in certain schools (UNESCO 2006b). The number of NCE qualified primary teachers fails to meet the demand in many states (FME, 2004). A recent report suggests that the current decentralised method of teacher recruitment encourages an oversupply of unqualified teachers and inequitable deployment (World Bank, 2008). It creates a persistent disparity in the quantity and qualifications of teachers serving in the various states of Nigeria (UNESCO, 2006b).

### ***In-service teacher training (ISTT)***

Policy documents such as the "10 Year Strategic Plan" (FME, 2007), the "Draft of National Teacher Education Policy" (FME, 2008) and the "Roadmap for the Nigerian Education Sector" (FME, 2009) emphasise the importance of training in improving teacher quality. Teachers admitted to teach in primary schools with certificates lower than the NCE are encouraged to join ISTT programmes to upgrade their certificates (Aderinoye, 2007). The National Action Plan (Oon, 2006) states that the ISTT has two main objectives: "to keep serving teachers on a course of lifelong learning [and] to encourage teachers to continue to be abreast of changes and modern trends in content delivery and recent pedagogies". Thus ISTT 'is seen as an effective means of augmenting the inadequacies of pre-service training. It is a process for continuous updating of teachers' knowledge, skills and interests in their chosen field" (Akon, 1991: 189). There are two ISTT tracks in place in Nigeria; an upgrading programme which leads to a degree qualification and a non-degree programme. The Technical Committee on Teacher Development and Curriculum Development within the UBEC -a statutory body of stakeholders in teacher education - is responsible for non-upgrading ISTT programmes (USAID 2003). The latter non-degree ISTT is not well known, and few teachers have participated in such workshops (USAID, 2003; Theobald *et al* 2007). The reasons for this are 1) the persistent legacy of a military regime which considered spending on such programmes inessential 2) teachers are not motivated to participate in training that is not linked with salary increases or promotions and 3) this type of ISTT is unpopular in Nigeria, most educators are not used to it and thus do not promote it (USAID, 2003). Teacher monitoring programmes are another form of ISTT programme where more experienced teachers work as mentors for less experienced ones in schools. Science and technology centres (e.g. The Science Equipment Centre in Lagos) also provide monitoring services teachers can join and be shown how to use science apparatus to make science teaching more authentic (FRN 2005).

The upgrading ISTT certificate programme in Nigeria is mainly provided by government bodies such as the NTI, Colleges of Education and the Faculties/Institutes of Education at universities (FRN, 2005). Other non-governmental bodies such as the Canadian University Service Overseas and professional Nigerian associations (e.g. the Science Teachers' Association of Nigeria) also organise in-service teacher training (Akon, 1991). At state level, the SPEB organizes short teacher training workshops which are executed by the LGEAs. Representatives from different schools are invited to participate in workshops and pass knowledge on to fellow teachers in their schools, following a cascade training model. Universities and CoEs organize similar workshops, the contents of which are decided locally. International donors such as UNESCO, the World Bank, DFID, USAID, UNICEF and local NGOs offer specific short ISTT programmes (USAID 2003).

Upgrading teachers' certificate to NCE is considered important by under-qualified teachers, as it leads to a salary increase of up to 50% and enables them to apply for admission into university (Theobald *et al.*, 2007). Additional reasons for Nigerian teachers to join upgrading ISTT programmes include: the mounting pressure from the Federal Government (particularly the Teachers Registration Council (TRC) and the NCCE) on teachers to obtain minimum teaching qualifications; the subsidies certain states pay towards tuition (in part or in full) for a proportion of teachers taking upgrading courses; and the study leave with full pay that public service regulations allow teachers, which up to five percent of public servants are eligible for per year (USAID, 2003).

### **The impact of ISTT programmes**

ISTT programmes have demonstrated some positive results in improving teacher quality. Evidence includes the number of enrollees for distance learning in-service training programmes at the National

Teacher Institute (NTI), such as the “Teachers’ Grade II” programme aimed at upgrading teachers with qualifications below Grade II. The programme started in 1984, and took students between 1 and 3 years. The data in table 1.2 below shows an increase in enrolment in the programme (FGN, 2005, p11). In less than 10 years a total of 854,742 participants were enrolled in the programme. Also, the table shows steady increase in the enrolment; from 15, 798 in 1996 to 102,229 in 2004. Another example of positive impact is the NCE which is provided by distance learning by the NTI (FGN 2005:12). This programme started in 1990 and aimed at upgrading Grade II certificate teachers (about 21% of the 400,000 teachers in Nigeria’s primary school system) to holders of the NCE which is the minimum prescribed qualification for teaching. The duration of the programme is four academic years and teachers are guaranteed NCE qualification upon successful completion. The total number of enrolments in the programme, 524, 960 between 1995 and 2004, is a positive sign that the number of teachers who are willing to improve their teaching qualification is increasing (tables 2.4 and 2.5), and that distance education is a viable way of them doing this. However, the total number of enrollees who managed to successfully complete the programme by 2004 was only 77,963, which indicates that further efforts must be made to investigate the reasons for teachers not completing, and initiate appropriate reform.

Table 18.4: Trends in enrolment in Grade II certificate

Table 18.5: Trends in enrolment in NCE certificate

Trends in enrolment in Grade II certificate (1996 – 2004)	
YEAR	NUMBER OF STUDENTS
1996	15,798
1997	13,915
1998	18,814
1999	34,729
2000	37,885
2001	113,199
2002	137,612
2003	127,561
2004	102,229

Trends in enrolment in NCE certificate (1995 – 2004)	
YEAR	NUMBER OF STUDENTS
1995	36,233
1996	31,375
1997	30,575
1998	29,632
1999	32,287
2000	42,703
2001	47,744
2002	71,714
2003	99,150
2004	103,547

Source: Federal Government of Nigeria (2005:11-12).

The cost of programmes is prohibitive for many potential trainee teachers. The direct private costs for upgrading to NCE through the NTI part-time programme in 2000/01 varied from N27, 830 in Imo State to N61, 700 in Cross River State excluding indirect costs (e.g. Stationery, examination fees, tutorials, practice teaching sites etc) which can mount up to N12, 000 per annum (Aarons, 2003). Such expenses pose the question of whether teachers can access such training without heavy subsidies (Garuba 2004). In addition, many teachers who upgraded through ISTT programs expressed dissatisfaction with the programs, claiming that knowledge gained was not worth the money as the programme contributed very little to their teaching experiences (Aarons, 2003). One argument against the ISTT is its narrow focus on upgrading with severe restrictions on effective teaching strategies to support the NCE or continuing professional development (CPD; Theobald *et al*, 2007: 25). As regards NCE, the ISTT does not give credit to the teaching experience of the under-qualified teacher and treats every participant as an inexperienced teacher. CPD is neglected and therefore “*the opportunity given to teachers to update their knowledge and skills is almost non-existent and most teachers rely exclusively on the pre-service training in carrying out their duties or training through externally funded projects*”. Oon (2006) supports this with the statement “*many qualified teachers have been in the system for many years without undergoing any retraining programme. Some are not given the opportunities to attend workshops and conferences. As a result, many of these teachers lack the required skills and competences for teaching in the 21st century*”.

### Distance Teacher Education

The number of qualified teachers produced through Colleges of Education is insufficient to see the country through to the EFA goals of providing good quality education for all and gender parity (DfID, 2010). Colleges of Education seem to be financially and physically unable to deliver training where it is most

needed. The colleges are not located within a manageable, affordable distance for students in rural areas, who account for over half of the population. This increases the severity of the demand for teachers in these areas. The percentage of female teachers participating in teacher training is lower in Northern States, especially in rural areas where the culture plays an important role in preventing women from travelling to cities for education (Akunga and Atfield 2010). In states with lower numbers of under-qualified teachers, educators need to be given the opportunity to develop and sustain their career through in-service training, which normally requires them leaving their schools and family to attend training courses at CoEs or Universities (Theobald *et al.*, 2007). This may disrupt school teaching schedules as well as being a financial burden to participants. Training bodies must cover the cost of building facilities, in order to accommodate the growing number of teachers who are supposed to be trained periodically; an issue the Nigerian government is not prepared to deal with given current financial constraints (Theobald *et al.* 2007). Distance education addresses the problem of un/ undertrained teachers by delivering training to a wide range of beneficiaries across the country. The National Teacher Institute (NTI) is an example of distance teacher education which has been initiated by the Federal Government in cooperation with UNESCO in 1970 (Aderinoye, 2007). In recognition of NTI's capability to utilise distance learning methodologies, NTI were given the responsibility of improving teaching quality and advising on how to accelerate the supply of teachers to keep pace with the growing demand for qualified teachers (World Bank 2001). This initiative was intended to support the introduction of UBE in 1976 which put further emphasis on the role of the NTI to assist with teacher supply through different distant training programmes. The importance of developing the NTI has been acknowledged in recent government policies and the NTI is required to play further roles in teacher education such as participating in training 900, 000 teachers between 2009 to 2011; participating in training all non-NCE teachers which the government is planning to achieve by 2011; participating in the School-Based induction for the new teachers (FME 2009).

The NTI programmes are predominantly delivered on printed materials that are intended to be readable and attractive for learners. The NTI adapts the teacher education curriculum, which is designed by the National Educator Research Development Council in Abuja, and tailors it to meet the needs of its clients as well as address the mode of its delivery. Materials developed by the NTI are well-thought-of and different institutes (including universities) utilize them in their conventional programmes (World Bank, 2001). The NTI provides its services through decentralized facilities in 36 states and the federal capital state including 220 study centres. Each centre has course tutors who provide learners with approximately 80 hours of face-to-face tuition per session with an average ratio of 30 students per tutor (World Bank, 2001). The teaching hours are flexible and most of the time students and tutors negotiate them.

Assessment is divided into two parts: continuous assessment and examinations which comprise 40% and 60% respectively. Continuous assessment is done by the local tutors while the examinations are administered by NTI examination board (World Bank 2001). The training programmes provided by the NTI include Teachers' Grade Two Certificate, Nigeria Certificate in Education and Diploma Programmes such as the Post Graduate Diploma in Education and the Advanced Diploma in Guidance and Counselling, School Supervision and inspection, and Early Childhood Education (Olakulehin 2008). Trainee teachers pay for printed materials, audio and video materials. Fees vary from a programme to another. The upgrading programme for the NCE –in addition to indirect expenses- costs between N27, 830 - N61, 700 depending on the state (UNESCO 2001). Aderinoye (2007) compares the expenditure per student on distance and conventional teacher education and concluded that the NTI programme is more cost-effective for students than the conventional college (Olakulehin 2008). The cost of distance teacher training is still relatively lower in comparison to similar conventional programmes of teacher training in regular colleges of education (UNESCO 2001) and that "Participants in distance education programmes have the benefit of being able to seek and retain paid employment without recourse to any institutional authority for support" (Olakulehin 2008: 128).

### **The impact of distance education programmes**

Distance education has proven it can be an effective and efficient method of teacher education in Nigeria. The Nigerian Country Report states 'that the overall impact of teacher training by distance education for policy can be found in cost effectiveness of the strategy, stability in the classroom, immediate application of knowledge and skills gained, increased access it offers to higher education and development of local experts in distance education' (Nigeria Country Report, 2004: 41). According to UNESCO (2001), the NTI has made a significant impact on teacher supply in Nigeria as it managed to provide the country with 21,000 NCE graduates in 1994, a number comparable to the total admissions in 58 colleges of education.

The annual NTI report in 2004 (cited in FME, 2005) details stories of success in different programmes. The enrolment in the 'Teachers' Grade II' programme which aims at upgrading teachers with qualifications lower than 'Teacher Certificate II' (TC.II) reached 854, 742 teachers (FME, 2005). In 1990 a programme was launched to upgrade TC.II teachers to NCE level. The duration of the programme is four academic years, divided into two semesters per year. The number of teachers enrolled in the programme reached 103, 547 in 2004 with total of 77, 963 graduates. In addition to these certificate programmes, in 2004 NTI started to run different distance learning diplomas (12-month plus a 3-month internship) in diplomas including the Post Graduate Diploma in Education (PGDE) for graduate teachers who have no teaching qualification and the Advanced Diploma in Guidance and Counselling for teachers who want to specialize in that field (Olakulehin 2008). In one year these diplomas attracted 6, 000 trainee teachers only 4, 500 in PGDE. A national report published in 2008 shows that the number of qualified teachers graduating from the PGED reached 11,500; 26,051 student have been upgraded from the TC.II teachers to NCE while a further 81,981 trainees – 75% of whom are females in semi-urban areas are currently enrolled (FME 2008). Table 2.6 below show the number of enrollees in different diplomas offered by the NTI.

Table 19.6: Initial enrolment of students for NTI Postgraduate and Advanced Diploma Programmes, 2006

Programme	Student population
1 Post Graduate Diploma in Education	4263
2 Advanced Diploma in School Supervision and Inspection	305
3 Advanced Diploma in guidance and Counselling	266
4 Advanced Diploma in Early Childhood Education	89
Total	4843

Source: (Olakulehin 2008: 129)

A further study by DfID states that distance teacher training helps to enhance teachers' academic and personal skills; develop their knowledge and improve their attitudes (Binns and Wrightson, 2006). The majority of participants in the study who graduated from NTI distance teacher education programmes stated that distance learning had helped them better organize their life, extend their reading, manage their time and engage more confidently in professional discussion. Also, they indicated that training helped them with lesson planning, subject knowledge and awareness of learner's needs. The head-teachers who supervised these teachers also witnessed the effectiveness and efficiency of distance training in improving teaching practices. They stated that teachers were more willing to work and share knowledge with colleagues. In the same study Binns and Wrightson (2006) stated that the effect of distance teacher education went beyond the boundaries of the school as some graduates sought to establish study centres in their area to make it easier for new enrollees to join the programmes; an initiative that had positive response from the local authorities (in some areas they provided land and buildings, in others transportation for teachers to the study centres).

A further study on the impact of distance teacher education on community development suggests that *"among others, that the distance education trained teachers are empowered in the local community. They are involved in matters affecting the community through community mobilization and sensitization, and by engaging in enlightenment exercises or by membership of community-based associations"* (FGN, 2005, p17). These results indicate successful achievement of "Teachers and Community development"; an issue that has been outlined in the *"National Action Plan"* as a tool for improving teacher education. The objectives were detailed as follow:

- To empower teachers to undertake activities that will be beneficial to the school community and enhance the status of teachers in the community.
- To train teachers to develop and implement projects in furtherance of their service to the school community.
- To reinstate the teachers into their past position of pride in the community.

Oon (2006)

Despite the positive achievements distance teacher training in Nigeria has on teacher enrolment and teaching quality, it remains limited in terms of access. The NTI, like other educational institutions in Nigeria, struggles with funding issues, poor quality staff and ineffective management, which all have a negative influence on the NTI's ability to retain and accomplish its mandate. These issues result in poor educational facilities and an inability to produce study materials, even when they have been paid for by the students; an issue that causes students to doubt the nature of Distance Learning (World Bank 2001). The study centres are under-resourced and overstretched; students-teacher ratios has exceeded by far 30:1. Under-funding has further affected the NTI's ability to hire good quality teacher trainers, resulting in a shortage of 474 academic staff (FME 2009). Teaching quality in the centres mimics to a large extent the problems encountered in conventional teaching where there is not enough room for interaction between learners and learners or with tutors (UNESCO 2001). Training is still too expensive; many teachers find it hard to participate in training. Garuba (2004) argues that the issue is not only in the cost of the training but the indirect expenses (e.g. materials, examination and transportation costs). Thus he suggests more support to subsidise distance teachers training. Data on enrolments and graduation between 1999 and 2002 (appendix 2.6.3) shows that a large proportion of participants managed to complete their course but could not qualify. Aderinoye (2007) believes this might be due to incapability of students to secure funds for learning, as teacher salaries were irregular throughout the year. UNESCO summarizes the challenge facing NTI students as follow:

*“the inability of trainees to afford course materials; the time needed for other income-generating activities; the disruption to the studies of female trainees as they follow a re-located husband; the demands of busy farming periods at examination time (especially in the northern states like Sokoto and Kano Bauchi, Niger, Kebbi, Adamawa, Sokoto, Plateau, Kano and Jigawa); late delivery of materials because of poor postal services; long distances to travel to study centres; failure to participate in the practical teaching element (a compulsory part of the course) and low pass rates in assignments and tests”*

UNESCO, 2001, p20

### **2.3.2. Policy 2: Teacher recruitment and deployment strategies to increase the number of qualified teachers**

#### **The Federal Teacher Scheme (FTS)**

The FTS was introduced by the federal government in 2005 to address several issues affecting teachers' access and quality for UBE. The first relates to the unwillingness of state governments to hire qualified teachers for primary education (in particular non-indigenous teachers from outside their states). The second is the shortage of qualified teachers in rural areas. Qualified teachers prefer to teach in urban areas, as remuneration is low in rural areas. Many qualified teachers prefer to find careers outside teaching than relocate. The third reason is the lack of practical teaching experience amongst new graduates. Usually graduates from CoEs undertake 12 weeks of practical teaching before they graduate, which is seen as insufficient to practice pedagogical skills.

To address the growing need for teachers in Nigerian schools, as well as the growing number of unemployed NCE-holders, the Federal Government introduced the FTS. The aim of this scheme as stated in the National Action Plan (Onn, 2006) is to increase the number of qualified teachers nationwide, by giving them an internship for two years at the Basic Education level where they are observed and monitored by more senior teachers (FRN 2005). The *“Roadmap for the Nigerian Education Sector”* specifies that government aims for a 25% annual increase in participants in the FTS (FME, 2009). Graduates are employed and posted in areas where their services are most urgently required. In most cases the Federal Government pays the teacher's remuneration (N 10,000 per month, just N 2000 less than a full teacher salary) (USAID, 2003). As the scheme aims to address the shortage of qualified teachers in the UBE programme, salaries for junior secondary schools teachers are shared between the Federal Government (47%), states (35%) and local governments (18%). States are expected to absorb FTS teachers into their schools at the end of the two years (FME 2005, FME 2009). In 2005, when the scheme started, the federal government was planning to pay salaries for around 40, 000 FTS teachers (Taiwo 2006, UNESCO 2006).

#### **The impact of the FTS**

The FTS faced many difficulties. Payment issues and the quality of participants were major concerns for State Governments. However, these issues were resolved by November 2008 as states with the highest teacher shortages agreed to hire 1000 qualified teachers each from the scheme (AllAfrica, 2008). These states were Adamawa, Bayelsa, Borno, Cross River, Gombe, Jigawa, Kano, Nasarawa, Niger, Sokoto, Ondo, Oyo, Yobe, Zamfara and FCT. In January 2009, the FME announced reinvigoration for UBE by recruiting 34,000 qualified teachers from the FTS across states and the Federal Capital Territory (Ola 2010). It is hoped that these teachers who have been updated in modern teaching skills, will gradually replace the number of unqualified teachers (38.75%) in the system and help in recruiting unemployed trained teachers (UNESCO 2004).

Although the hope was for the FTS to yield large numbers of qualified teachers to aid state governments in improving the quality of teaching in schools, and despite the evidence suggesting the scheme has worked, many states have registered fake applications for the FTS. The UBEC recently published a list of fake teachers on its pay roll. More than 3,248 teachers employed under FTS do not have the qualifications they claim to possess, and on the basis of which they were employed. Adamawa State had the highest number of fake teachers (410) followed by Cross River State (386) (BNET, 2010).

### **2.3.3. Policy 3: Increasing the number of female teachers in rural areas to increase girls' enrolment in schools**

A lack of incentives for teachers to work in rural area makes it an unattractive career option. This is particularly severe in rural areas for female teachers due to poor security, housing, social and cultural factors (Akunga and Attfield, 2010). In the northern part of the country teachers –especially female teachers - are desperately needed. Data from the Basic Education Profile for Northeast Nigeria show high illiteracy rates among female parents/guardians; 80% compared to 46% on the national level (National Population Commission, 2004). Parents /male guardians in northern states are reluctant to enrol girls in formal education because schools are not within a safe distance and they are sceptical about the ability of schools to deliver sound and conservative education (USAID 2003). In addition, many parents or guardians think that the social return for girls' education is particularly low (Kazeem 2010). Girls' enrolment in education is very low, especially in the rural areas.

Female teachers are needed as role models to encourage girls to attend school and make parents feel more confident in sending girls to schools (FGN 2005). Women teachers at primary schools in Nigeria – particularly in the rural areas- are considered more encouraging for girls to attend schools and more capable of creating a child-friendly learning environment that discourages the use of corporal punishment (Akunga and Attfield, 2010). Employing female teachers affirms to the community that female education does not imply radical reappraisal against their religious and cultural values. Rather, it is about empowering women to better understand their religion and cultural values as well as protect themselves while they are fulfilling their duties in community as educators, health workers or in other employment (USAID 2003).

Teacher issue in the northern part of Nigeria (north) is not the willingness of the female teachers to teach but their availability. Severely ineffective teacher deployment is coupled with a scarcity of qualified female teachers, particularly in rural areas (USAID 2003; FME 2009). Akunga and Attfield (2010) assert that qualified female teachers are often reluctant to serve in remote areas unless they come from those areas. They add that it is difficult for female students from rural area to enrol in colleges of education - this is not an issue of tuition fees as most colleges of education provides tuition free for girls. Rather, it is the cost of living in urban areas and concerns regarding the security of accommodation that deter prospective female trainee teachers or male guardians. The NCCE (2002, cited in FME, 2003) reports that female admission rates to CoEs are as low as 20% in the northern states, in comparison to southern states where female participation rates exceeded 75% in 2000/2001. Further data details that female participation in colleges of education in northern states (Adamawa 34.4 %, Jigawa 44.3%, Katsina 16.9%, Kebbi 23.5%, Yobe 18.4%) is far lower than southern states (Ogun 63.4%, Ekiti 77.9%, Edo 64.8%, Anambra 93.7%, Abia 71.1%) in 2001 (FME, 2003) . A study by Nwangwu (2001) suggests that states with low female participation in teaching are also those with low girl-child participation in school.

The “*National Action Plan*” (Oon 2006:7) articulates the objectives of girls' education as “to reduce gender gaps in education [and] empower teachers and school administration to influence policies on best practice in gender education”. This has led many states in the north to utilize the Nigerian Gender Education policy



which encourages “State Governments to design innovative strategies for a massive drive to train and deploy female teachers from within states to work as teachers, particularly in rural areas where teacher deployment is a challenge”. Thus, northern states have adopted strategies for increasing women's participation in teaching to provide more female role models for girls in school. In December 2005, UNICEF and the Nigerian government, with funding from DfID, collaborated in launching the Northern Girls Education Project (NGEP) for the states with the most severe disparities between boys' and girls' enrolment in primary school (Borno, Jigawa, Bauchi, Katsina, Sokoto and Niger). This was designed to increase gender parity in basic education and encourage more females to enrol in teacher education programmes. This project was informed by feedback from the successfully implemented African Girls' Education Initiative (AGEI – 2001-2003), 'Strategy for Acceleration of Girls' Education in Nigeria (SAGEN - 2003) and SAGEN Plus by UNICEF (UNICEF 2007). NGEP aimed at getting more children to school as well as reducing gender disparities in primary and secondary education. It also aims to 1) foster socio-economic change in societies that have historically discriminated against girls and women, 2) prompt better gender practices in education and 3) sensitize gender issues in terms of educational policy (Akunga and Attfield, 2010).

The question to be asked is how the NGEP addresses the issue of teacher gaps to achieve EFA goals. The project aims to reach the most marginalized girls in Nigeria –specifically rural Hausa speakers- into schools and allow them access to good quality education. In 2008 the GEP introduced a new scholarship scheme to train women from rural areas to become qualified teachers. The scheme is co-financed by the NGEP, government and private bodies. The scheme provides trainee teachers with an annual subsidy of \$330; state government pay full tuition fees and CoEs provide secure accommodation as well as rented houses for students with infants. CoEs are the best mechanisms for families to mentor their girls by providing phone connection between the families in the rural areas and the students in the urban areas.

#### **The impact of strategies to increase female teachers in rural areas**

With \$50 million committed by DfID, the scheme was launched in 2009 and quickly gained momentum. 770 students started teacher training education and expressed deep satisfaction with the programme. In Akunga and Attfield's (2010) study one trainee teacher with a child reported that the annual stipend N50,000 (£200 / \$ 320) provided by the scheme allows her to spend 60% on living expenses and have some savings. The scheme has registered an additional 1,110 new female trainees to start their training in 2010. Only 20% of those are funded by the NGEP and 80% are funded by the government; a step that shows “the initiative will be both sustainable and scalable” (Akunga and Attfield 2010: 8). This scheme is expected to lead to an additional 100,000 primary school children being enrolled in schools in rural areas, as they start to receive an additional, steady flow of local qualified female teachers (Akunga and Attfield 2010).

#### **2.3.4. Policy 4: Non-civil service teachers to close the teacher gap**

In order to understand the issue of non-civil servant teachers, it is necessary to understand the situation that lead to their existence. The rapid growth of students' enrolled in school following the implementation of the UBE policy, as well as the reluctance of people to join the teaching career, resulted in a severe shortage of qualified teachers, particularly in rural areas (Akunga and Attfield 2010). This is in spite of the growing number of teachers graduating from Colleges of Education around the country (FME 2009). The percentage of unqualified teachers in the North-West is 46.8%, North-East 57% and the North-Central 38%. The percentage is far lower in the other geopolitical zones. In the South-West only 6.7% of the teachers are unqualified in comparison to 16.7% in the South-East and 19.2% in the South-South (Alli 2010). The FME states that “no fewer than 207,813 of the 603,461 teachers under the UBE scheme are unqualified and that state governments would have to employ 39,524 teachers yearly in the next six years to fill the vacuum in public schools” (Alli 2010:??). In addition, the NCCE declares that more than half of CoE graduates are unemployed. This is not because of scarcity of the teaching posts but mainly because the majority of these post are the rural areas where NCE holder from cities are not willing/able to fill (FME 2003; FME 2007). Despite some individual states incentives (e.g. 100% salary increase, hardship allowance and tax free salaries (Keynan 2010)) to encourage qualified teachers to work in rural areas, many teachers found these incentives unattractive (FME 2009). This issue has been discussed extensively in different government policies (FME 2007, FME 2009), yet it is still an issue for local governments that are responsible for securing reasonable numbers of qualified teachers in primary education.

The number of non civil-servant teachers further increased as a result of the recruitment system itself. Although the constitution of the Federal republic of Nigeria stresses that LGEAs, through school head-

teachers, are responsible for running and managing primary education (including teachers' recruitment and deployment), there is still uncertainty about how that could possibly happen without the approval of the SPEB. According to the constitution, state ministries of education should not interfere in the managing and running of primary education. Rather, local government should be able to exercise a great degree of autonomy as they are the most knowledgeable bodies about their needs and context (FME 2009). In addition, the decentralization of primary education is meant to help LGEAs at grassroots levels make quick decisions that address needs in primary education in order to help accelerate the achievement of the MDGs (UNESCO 2006). However, what has actually happened is a failure to shorten the teacher recruitment cycle appropriately. Headteachers must still seek local governments' authorisation prior to recruiting a teacher. The local government is usually happy to authorise the recruitment, as long as they can grant the approval of the SPEB. The SPEB need an approval from the state ministries of education, which in most cases is rejected. The ministries of education often refuse to recruit qualified teachers, on the basis that they lack funds, or sometimes for unapparent reasons (USAID, 2003). Despite these hurdles, local governments are expected to deliver good quality education for their citizens and cope with the growing student enrolment in primary education.

In the face of considerable challenges, local government authorities have attended to teacher shortages by recruiting non-civil servant teachers. In rural areas where the teacher shortage is extremely severe, the local government or, in rural tribal areas, chiefs, hire local graduates of senior secondary (or even junior secondary graduates) to teach in primary schools, on lower salaries than qualified teachers would receive. However, as these teachers do not have the minimum required NCE teaching certificate, they are hired as non-civil servant teachers. While they are unqualified teachers, they help increase the number of teachers in schools, which increases school's capacity to admit higher student numbers. Secondly, in urban areas with problematic recruitment cycles, the local government addresses the teacher gap by cooperating with Parent-Teacher Associations (PTA) in two alternative ways (UNESCO 2006); either to hire non-qualified teachers, who are senior secondary school graduates or hire qualified teachers from other states, with far lower salaries than civil servant teachers. This occurs as many state governments with severe teacher shortages are reluctant to recruit teachers qualified out-of-state as civil servants and pay them a full teaching salary (World Bank 2008) *"between 1999 and the year 2000, the Bauchi State Government terminated the services of teachers who were non-indigene from its teaching services; a situation which resulted in acute shortage of teachers in virtually all schools in the state without a prior provision for replacement"* (Odiat, and Omofonmwan 2007:82). Both non-qualified and out-of-state teachers are considered non-civil servants in urban areas and their salaries is paid through the local PTA, local government or jointly between them. With the help of non-civil servant teachers, local authorities address the teacher gap in schools at a relatively low cost.

A further situation that has encouraged the recruitment of non-civil servant teachers is the existence of Qur'anic/Tsangaya and Islamiyya schools. These schools are famous in the northern states and are traditionally privately run, financed and managed (USAID 2003; USAID 2006)). The Qur'anic/Tsangaya schools are mostly run by individual teachers (Mallams) assisted by senior students (almajirais). The financing of these schools depends heavily on donations from the community. In some cases where funding is not provided by the community or parents, teachers use the students to work for them and raise money (USAID 2003). Mallams are not qualified teachers in the traditional sense as they have not been to colleges or received any formal education. However, they are excellent in memorizing Qur'an and Hadith as well as reading and writing in Arabic, which are the only subjects they formally teach (USAID 2006). Their teaching pedagogy relies heavily on mimic and memorization; and mistakes are unacceptable. Thus corporal punishment is the only way to correct students' misconducts and educational mistakes (USAID 2006).

Unlike the Qur'anic schools, Islamiyya schools are mostly run, financed and managed by local religious figures or businessmen (Developments 2010). These are well organized and have classrooms, staff, teachers and headteachers. Islamiyya schools teach Arabic and different Islamic related subjects such as Sirah (the biography of the prophet) and Tajweed (the way of reading Qur'an, (Developments, 2010). Teachers in Islamiyya schools are modern versions of those in Qur'anic schools. They have gone through certain level of formal education and some of them are certified teachers who do not only teach Qur'an and Islamic sciences but also integrate the new and necessary European learning, but within a firmly religious context (USAID 2006). Although teachers in Islamiyya schools have been educated formally in the science of Quran, Hadith and Arabic language and use moderately effective instructional techniques in

their teaching, most of them are unqualified (Aderinoye 2007). However, some Islamiyya schools are recruiting qualified teachers for subjects such as sciences, English language and mathematic.

Both Qur'anic and Islamiyya represent a challenge for the education system in Nigeria as they lack the division of labour in teaching, as well as formal supervision and evaluation mechanisms (USAID 2003). In Borno State alone there are more than 3000 Qura'nic schools that accommodate over 65% of the primary schools students in the state. The Federal Government in 1981 and 1998 tried to address the integration of Qura'nic schools into the education system. However, very little has been achieved from individual state efforts. Despite the fact that these schools provide education for the majority of students in the Northern state, the governments are concerned about the quality of teaching offered as the majority of the teachers are unqualified. Although many Qura'nic schools have been faded out to a pre-school stage and many other Islamiyya schools have been integrated into instream formal education, the issue of quality education persists. Thus the Federal Government pursues the process of mainstreaming these schools in order to achieve the EFA goals. The "10 Year Federal Education Plan" (FME 2007) emphasised integrating the Qura'nic education into ECCDE. The "Roadmap for the Nigerian Education Sector" (FME 2009) has also increased the pressure to accelerate the mainstreaming of Qura'nic education programmes and puts 2011 as the deadline for achievement. These policies result in many Islamic schools, especially in the north, now competing with public schools, as they offer a full range of subjects in addition to the standard religious instruction (USAID 2006).

Non-civil teachers and Islamic schools help address teacher shortages in primary education. However, it is important to mention that recruiting non-civil service teachers and having in place a large number of schools that are difficult to include in national monitoring plans may come at the expense of quality teaching and learning in schools. Different studies have highlighted gaps in teachers' subject knowledge as well as teaching methods (Aarons 2003; USAID 2006). However, the recruitment of specialist teachers in Islamic schools indicates that there may be methods of finding compromises between the formal education and sector and schools which provide education largely limited to acquiring religious knowledge in prescriptive ways. One state education minister has declared that he is planning to phase out unqualified teachers to improve the quality of education in his state (Ibrahim 2010). This supports recommendations by the Federal Minister of education "we urge states to stop employing unqualified teachers; rather they should absorb graduates of the Federal Teachers' Scheme" (Alli 2010). Hiring qualified teachers as non-civil servants also affects the morale of teachers in schools, which is an issue that influences productivity levels in schools (Ibrahim 2010). Ajetomobi and Ayanwale (?) and Shiklam (2010) point out that the non-civil servant teachers negatively influence teacher motivation in schools as in many situations one can find two teachers with similar qualifications but a huge gap in salaries.

## 2.4. Conclusion

### 2.4.1. Summary of main findings

The analysis of policies and programmes on teacher education yielded the the following conclusions:

- There were difficulties accessing data about programmes and policies for teacher education; particularly those that have been initiated and run solely by different tiers of government as insufficient data is available to make judgements about their effectiveness and efficiency (e.g. the 100% increase in teachers' salary Jigawa in 2002; teachers' housing scheme in Yobe State in 2005 and teacher tax free and motorcycle allowance in Cross River). Keynan (2010: 2) asserts that "*the education system in Nigeria has been seriously undermined by huge and persistent data gaps, making informed planning and effective monitoring and evaluation immensely difficult*". The issue of inadequate and inaccurate data has been highlighted in Nigeria's educational policies (FME 2007; FME 2009). However, when programmes or policies have been designed or implemented jointly with an international donor, there is a huge amount of information available from alternative sources. For example, there is extensive information about girls' education initiatives in the northern states supported by DfID and UNESCO documents but nothing mentioned in the FME website.
- There a great tension between the different tiers of the Nigerian government when it comes to education management (UNESCO 2006 and USAID 2003). The discussion above on teacher recruitment shows a disparity between the willingness of the Federal Government to encourage local government to accelerate the implementation of UBE, particularly in primary education, and the reluctance of some state governments in deploying teachers. "There was disagreement between

the Executive and the legislature over roles and responsibilities of the three tiers of government, especially financial and monitoring; financing of primary education from local government allocations; the structure of UBEC” (Theobald et al 2007: 16). It seems that the FME lacks the power to execute legislation. Thus decentralizing the management of primary education has impacted negatively on the quality of teaching as many qualified teachers are not hired as civil servants. In fact the national policy on teacher recruitment fosters the hiring of un/under qualified teachers. It is clear that one of the most prominent problems of educational development in Nigeria today is that of “responsibility and control”: the conflicts between the Federal, State and Local Governments in the management and control of various levels of education (Adeyinka 1992). Keynan states that “although [education is joint responsibility for Federal, state, and local governments, still this joint] mandate is not always clear. At the same time each level of government has its own jealously guarded jurisdictional enclave” (2010: 3).

- FME initiatives or programmes yielded positive results when the FME took part in their execution. Although the FTS is aimed at meeting the demands for qualified teachers for UBE by hiring NCE holders and deploying them where they are most needed, there are still concerns about how different state governments would respond. The other issue which has not been clearly addressed in the scheme is the ability of teachers to speak local languages.
- The certificate upgrading ISTT programmes run by the Colleges of Education and NTI are achieving what they have been designed to do as teacher quality –according to the country education policy– is prescribed in terms of obtaining the minimum teaching certificate which is NCE. Thus most in-service teacher training programmes are geared towards topping up or upgrading non/under-qualified teachers to obtain the NCE. However, some teachers are unable to afford the cost of their training. In addition, these training programmes do not have any scope for Continuing Professional Development (Theobald et al 2007: 16). This means that qualified teachers are informally excluded from the in-service teacher training.
- Distance teacher education has made a significant contribution to increasing the number and the quality of teachers’ nationwide (UNESCO 2001). However, concerns about the quality of this type of teacher education have been raised, including issues of availability of funds and the lack of the proper delivery of distance education which Aderinoye (2007) believes is a result of the lack of government rigorous policy on distance education. The NTI is limited in its ability to provide education of a standard in conventional face to face programmes.
- Education that is sensitive to the local, cultural and religious issues and address marginalized groups in their own terms has been proven effective for the Nigerian education. For instant, the girl education initiatives in the Muslim states in northern have yielded positive results and encourages Husa girls in the rural areas to enrol confidently in the UBE. The sensitive measures that has been taken for educating the northern girls through creating motivating and cultural sensitive teacher training for the girls from the rural areas has positive impact on addressing teacher gaps.
- The non-civil teachers have great contribution to the education system in Nigeria. They help to increase the number of teachers and allow education to reach to the areas where civil ones are reluctant to teach. However, the quality of teaching delivered by the non-civil teachers is always questionable as majority of them did receive any formal teacher training. While the issue for out-of-state non-civil servant qualified teachers exists within their morale which always low as they are expected to do much for little pay in comparison to their colleagues who are civil teachers (UNESCO 2006). The whole situation that led to the existence of the non-civil teachers is bad recruitment policies especially in primary education.
- Equity education in Nigerian means more than students’ gender issues and access to education for the marginalized students. It is always combined with good quality education. It could be understood in terms of allowing students from less advantaged group to join teacher education and become qualified teachers in their communities that are cable to provide good quality teaching. Training female in Colleges of Education to become teachers in Northern States and the integration of the Islamic schools into the mainstream is good example of equity that is tight with quality as the teachers in both cases are allowed the opportunity to develop and improve their teaching practice to good quality standards that will help to improve the teaching quality in their areas. Also, the FTS

could be understood in terms of equity and quality promotion as the programme aims at deploying teachers where they are needed the most as well as allow trainee teachers to be monitored and supported for longer period. This means most of the rural areas would have equal access to good quality teachers and trainee teachers would have longer teaching exposure. In addition, the programme allows out-state non-civil servant teachers to be given equal state in term of job contacts to their indigence counterparts. Furthermore, the non-qualification in-service teacher training which aims at improving the quality of serving qualified teacher could be contextualized as equity programme in away that old timers qualified teacher are given an equal chance to maintain and improve their teaching skills and practices through short-term workshops and seminars to the standard of new graduate teachers. It is hoped that all these examples of equity in teacher education would help to see the country through with good quality education to the promised land of EFA.

#### **2.4.2. Policy lessons and recommendations for a) the country that has been reviewed and b) for other countries**

- Data issues: there should a well developed Management Information System for each state ministry of education as well as in the FME. The FME has recognized this as a challenge in the “Roadmap for the Nigerian Education Sector” (FME 2009) and called for the establishment of effective and accurate “Education Management Information Systems (EMIS) to ensure the maintenance and update of relevant, credible data for use in educational planning and resource management. It also covers implementation of approved policies and strengthening of data linkages between organisations that generate and use information”. Keynan (2010) argues that despite the fact that different policies has been developed and adopted by the FME regarding EMIS, the availability of data accurate date that would planning is still a challenge. From my observation, I would say that the FME as well as the state ministries of education should seek advice from the international donor such as DIFID, UNESCO, and UNESIF as these bodies has been doing effective job of information management.
- The Federal Government has tried to address the issue of ISTT in different policies. The recent “Roadmap for the Nigerian Education Sector” has addressed the issue of under qualified teacher which has been estimated by 38.75% of the teacher nationally with 70% in the northern states. Also, the policy has acknowledge the importance of the non qualification ISTT and specified that FME is planning to train 145,000 serving teachers per annum for three years and put 2011 as baseline (FME 2009). The issue is an issue budget allocation as well as the coordination between the different tiers of the government more than an issue of policy. Thus strong commitment need to be shown by different tiers of the government to allow the effectiveness of this training to reach teachers everywhere in the country. In addition more school-based in-service training needs to be funded and encouraged as it is in the very heart of professional. Furthermore, more transparent measures need to be used for monitoring and evaluating the effectiveness of these policies.
- It is clear that the Muslim community in the northern states are wary about the western education and the organizations that provide support for the education. This might be one of the factors that contribute to the slowness of the integrating the Islamiyya and Qua’nic schools into the formal education system. The Nigerian government might need to look into the support of Muslim organizations such as the Islamic Bank, Muslim World League to fund educational projects in the north.

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## 2.6 Appendices

### 2.6.1 Abstract of some key principles to help reform teacher education in Nigeria (National Teacher Education Policy 2008: 7)

- Initiating attractive incentive programmes in order to attract competent people into teaching profession. These includes
  - f) *Scholarship schemes: In order to encourage admission into the NCE and Bachelors degree programmes in education, the following incentives shall be provided: Scholarships for tuition, feeding, book allowances and monthly stipends for general up-keep*
  - g) *Special incentives will be given to prospective primary school teachers willing to be posted to rural or disadvantaged areas in form of rural posting allowance.*
  - h) *More incentives will be provided for candidates studying ECE, Primary Education Studies and the following other areas: Science, Technology, and Mathematics (STM), English language and French.*
  - i) *Teacher trainees on Teaching Practice and Practicum should be recognized and harmonized with the Student Industrial Work Experience Scheme.*
  - j) *The Federal Teachers' Scheme, which guarantees employment for a minimum of two years for qualifying NCE graduates, shall be sustained by eliciting commitments of State Governments*
  - k) *The proposed Teachers Salary Scale (TSS) shall be implemented forthwith by both the Federal and State Governments.*
- Ensure an efficient, supportive and constructive supervision that helps produce successful student teachers. This can be attained through successful implantation of the following factors:
  - I. **Teaching practice**
    1. *Every student teacher shall be exposed to professional training in the school system through the Teaching Practice (TP) exercise.*
    2. *At least one course will include a minimum of 30 hours of micro-teaching, to be carried out before TP begins (2 credits).*
    3. *The duration of the TP for NCE shall be for a total of two (2) terms; one at 200 levels and the other at the 300 level. The TP shall begin with guided classroom observation, followed by instruction assisted by the classroom "cooperating teacher" and ending with assumption of full responsibility for teaching with the cooperating teacher remaining in the classroom.*
    4. *For the Bachelor's degree programme, the duration of the TP shall be for a total of two academic terms, one at the 300 level and the other at 400 level.*
    5. *The period between the two exercises shall be devoted to a critical analysis and enrichment of TP experience.*
    6. *Each student teacher shall be supervised and assessed by different personnel at least six (6) times during each TP exercise. As much as possible student teachers shall be supervised by subject specialists.*
    7. *Standardized TP assessment forms and procedures shall be developed for supervisors of TP: university/COE/NTI academic staff, head teachers/cooperating teachers and external moderating agencies.*
      - a. *Assessment scores given by university/COE/NTI staff shall account for 40% of student teacher's overall TP score.*
      - b. *Assessment scores given by head teachers and cooperating teachers shall account for 20% of student teacher's overall TP score.*
      - c. *Assessment scores given by external moderating teams or relevant government agency (NUC/NCCE and TRCN) shall constitute 40% of the student teacher's overall TP score.*
    8. *Student teachers shall be paid a minimum amount not below the minimum wage as stipends during the TP period by State Government/LGA (primary).*
    9. *A standardized module will be provided to all supervisory personnel delineating procedures for supervision and assessment, with a special emphasis on the role of supervisors in helping and supporting student teachers rather than fault-finding and punishment.*

10. Assessors shall have an orientation programme on assessment procedures.

## **II. Induction**

1. A structured process of deployment and supporting graduates (NCE or Bachelor's) in their first year of service as teachers shall be developed.
2. Supervisory personnel from MOEs, TRCN, SUBEBs and LGEAs shall receive training in standardized procedures for ensuring optimal support for new teachers during the induction period.

## **III. Certification and Licensing**

1. After graduation from the NCE or Bachelor's program, each new teacher shall be registered by the TRCN after one year of internship with mentoring. and get licensed
  2. Recertification of every registered teacher by the TRCN, based on evidence of continuing academic and professional development, shall take place every three years.
- Ensure that teachers are kept motivated through providing genuine in-service teacher training opportunities that allow them to continue their professional development, and career advancement and improvement. That could be achieved through:

### **I. Up-grading Programs (Certification)**

1. All policies relating to full-time PSTE programs (e.g., infrastructure requirements) shall equally apply to the NTI's distance learning and the universities/COEs part-time or sandwich programs leading to the award of the degrees/NCE, except for policies on infrastructure and funding.
2. A formula for awarding credit for previous education or experience shall be developed and applied for teachers who are upgrading from TCII or Grade II to NCE or from NCE to Bachelor's status.
3. The universities, COEs' and NTI's ISTE- Bachelor's/NCE programs shall only be for serving teachers.
4. Teachers' licenses shall be renewed every year by the TRCN.
5. A professional career ladder shall be developed and linked to the Teacher Salary Structure (if passed), taking into account seniority as well as results of performance-based evaluations (e.g., tests, observation of teaching, assessment of teacher products, etc.) in order to provide rationale for advancement.

### **II. Continuing academic and professional development (CPD)**

- Ensure that teachers are constantly updating their knowledge and their tools need for performing their jobs as well as relevant in a rapidly changing world. In order to achieve this principle the following steps need to addressed:
  1. There shall be a structured career progression based on qualification of teachers at all levels.
  2. There shall be a systematic and coordinated continuing professional development programme for all teachers which will be linked very closely to the pre-service training programme.
  3. The universities, COEs, NTI, SUBEB/TESCOM and TRCN shall provide continuing professional development (CPD) opportunities for all teachers.
  4. Every teacher shall be required to participate in at least one CPD programme of at least 4-day duration once every two years in order to maintain his/her professional status. The TRCN shall develop and implement a standardized instrument for assessing CPD activities to be approved for renewal of teachers' professional status.
  5. CPD opportunities shall be based on needs assessments conducted by relevant agencies and other collaborating institutions.
  6. Strategies that promote training closer to the school, such as school- based and cluster-based formats, shall be encouraged.
  7. School-Based Management Committees (comprised of parents, teachers, community leaders, etc.) shall be established in each primary, JSS or SSS and provided with standardized instruments and training in order to monitor CPD activities.

8. *Incentives to teachers on CPD shall be in the form of:*
  1. *Linking of CPD to career development such as promotion and renewal of TRCN licences and*
  2. *Sponsorship by UBEC/SUBEBS/TESCOM and LGEAs.*

## 2.6.2 An extract form the “Roadmap for the Nigerian Education Sector”

Turn-Around Strategies	Deliverables	Timeline
Employ, train, re-train and mentor qualified and licensed teachers	Increased number of qualified teachers	Aug.2009
Implement the reviewed Teacher Education Curriculum	2000 copies of Teacher Education curriculum printed, distributed and monitored	Dec.2009
Ensure that all schools are staffed according to the National Policy on Education and UBEC Minimum standards for teacher: pupil ratio and teacher/ staff qualifications	Additional 900,000 qualified teachers employed	2011
Provide more incentives for teachers to attract and keep quality teachers in schools	Better quality teachers in Schools	2011
Implement the initiatives contained in the National Teacher Quality and Development Strategy (NTQDS) document	Better quality teachers in schools	2011
Upgrade all unqualified serving teachers through Special Teacher Upgrading Programme (STUP)	Increase in qualified teachers	2011
All States and FCT to strive to implement the Teacher Salary Structure (TSS), to be backed by enabling legislation	Legislation enacted and TSS implemented by States and FCT	2009
Develop programmes that recognise and reward teachers through incentives such as Housing for All Teachers Scheme (HATS), TSS, Teachers' Merit Awards, promotion, etc., especially for teachers in the rural areas	Increase in incentives programs	Dec 2010
Ensure gender parity in teacher recruitment	Gender parity in recruitment and deployment of teachers achieved	2011
Implement needs-based deployment of available teachers	Teacher deployment based on needs	2011
<ul style="list-style-type: none"> <li>- Implement the National Framework for Continuing Professional Development for teachers</li> <li>- Implement the National Framework for School-Based Induction for Beginning Teacher</li> <li>- Train Head teachers and assistant heads in instructional leadership and supervision</li> </ul>	145,000 teachers trained annually for three years	2011
Institutionalise career development	Career development institutionalised	2010
Accelerate the phasing out of all unqualified teaching staff from the system	Qualified teachers in schools	2011
The route to promotion needs to be based on performance	A system that rewards good performance	2010
Increase teacher retirement age to 65 and the last five years of service teachers could be redeployed to mass literacy programs	Experienced and motivated teachers in mass literacy programs	2010
Increase the capacity of Colleges of Education to produce quality teachers	Increased number of qualified teachers	2011
Explore the possibility of designing a system where teacher remuneration is based on qualifications and experience not the sector	A feasibility report on the cost/benefit of a redesigned system	2010

(Source: FME 2009: 29-30)

## 2.6.3 NCE Enrolment and Retention

### NCE Enrolment and Retention, 1995-1998 Cycle

Serial no.	State	Number enrolled	Completers	Total qualified	Pass rate (%)
1	Anambra/Enugu	433	384	299	77.9
2	Bauchi	200	110	35	31.8
3	Edo/Delta	596	537	495	92.2
4	Benue/Kogi	109	90	45	50.0
5	Borno/Yobe	236	221	117	52.9
6	Crossriver	436	295	151	51.2
7	Adamawa/Taraba	111	96	57	59.4
8	Imo/Abia	600	555	486	87.6
9	Kaduna	205	195	113	57.9
10	Kano/Jigawa	712	264	42	15.9
11	Kwara/Kogi	189	118	97	82.4
12	Lagos	578	479	402	83.9
13	Niger	33	32	29	90.6
14	Ogun	75	72	70	97.2
15	Ondo	275	229	217	94.8
16	Oyo/Osun	212	294	167	81.9
17	Plateau	88	77	40	51.9
18	Rivers	261	135	99	73.3
19	Sokoto/Kebbi	712	399	68	17.0
20	FCT	41	40	008	20.0
21	Katsina	1064	419	213	50.8
22	Akwa Ibom	435	353	248	70.3
	TOTAL	7,581	5,304	3,498	66.0

### NCE enrolments and Retention, 1996-1999 Cycle

Serial no.	State	Number enrolled	Completers	Qualified	Pass rate (%)
1	Anambra/Enugu	436	386	330	85.5
2	Bauchi	360	162	43	26.5
3	Edo/Delta	706	552	483	87.5
4	Benue/Kogi	237	189	156	67.2
5	Borno/Yobe	127	103	61	59.2
6	Crossriver	399	186	111	59.7
7	Adamawa/Taraba	650	254	102	35.9
8	Imo/Abia	534	399	344	86.2
9	Kaduna	435	288	100	34.7
10	Kano/Jigawa	701	81	29	35.8
11	Kwara/Kogi	270	163	114	69.9
12	Lagos	659	540	428	78.3
13	Niger	544	507	174	34.3
14	Ogun	83	76	71	93.4
15	Ondo	286	234	196	83.8
16	Oyo/Osun	281	221	169	76.5
17	Plateau	220	124	00	0.0
18	Rivers	224	131	110	84.0
19	Sokoto	180	57	00	0.0
20	FCT	98	38	14	35.9
21	Katsina	380	176	81	46.0
22	Akwa Ibom	324	327	217	82.9
23	Kebbi	270	163	00	0.0
	TOTAL	8,398	5,431	3,333	61.4

### NCE Enrolments and Retention, 1997-2000 Cycle

Serial no.	State	Number enrolled	Completers	Qualified	Pass rate (%)
1	Anambra/Enugu	541	480	419	87.3
2	Bauchi	253	134	3	2.2
3	Edo/Delta	693	482	431	89.4
4	Benue/Kogi	840	553	370	66.9
5	Borno/Yobe	102	77	23	29.9
6	Crossriver	218	127	48	37.8
7	Adamawa/Taraba	182	107	42	39.3
8	Imo/Abia	601	451	356	78.9
9	Kaduna	220	118	16	13.6
10	Kano/Jigawa	1,669	393	107	27.2
11	Kwara/Kogi	211	134	78	58.2
12	Lagos	541	504	390	77.4
13	Niger	211	197	00	0.0
14	Ogun	51	41	34	82.9
15	Ondo	423	375	255	68.0
16	Oyo/Osun	151	100	60	60.0
17	Plateau	128	79	63	79.7
18	Rivers	138	14	0	0.0
19	Sokoto	326	121	0	0.0
20	FCT	246	110	21	19.1
21	Katsina	261	123	30	24.4
22	Akwa Ibom	230	190	128	67.4
23	Kebbi	285	123	0	0.0
	TOTAL	8,521	5,167	2,872	55.6

### 2.6.4 Teacher Distribution

**Table 1: Number of Teachers by Level of Education**

Pre – Primary	Primary	Secondary	Years
NO RECORD	423,711	114,916	1999
	433,550	212,021	2000
	454,180	129,534	2001
	491,295	134,976	2002
	591,041	180,278	2003

Source: Baseline data, 2001 and Digest of Statistics (UBEC), 2005

**Table 2: Gender Distribution of Teachers by Level of Education**

PRE PRIMARY		PRIMARY		SECONDARY		
M	F	M	F	M	F	
NO RECORD	NO RECORD	216,198	207,513	68,816	46,100	1999
		51%	46%	53%	47%	
		219,909	213,641	71,127	49,894	2000
		59%	49%	54%	46%	
		240,763	213,417	75,060	54,474	2001
51%	49%	53%	47%			
248,904	242,391	80,780	54,196	2002		
51%	49%	60%	40%			
309,806	281,235	111,008	69,270	2003		
52%	48%	62%	38%			

Source: Baseline Data, 2001 and Digest of Statistics (UBEC), 2005

**Table 5A: Geographic distribution of primary school teachers**

S/N	States	Primary School					Percentage Shares				
		1999	2000	2001	2002	2003	1999	2000	2001	2002	2003
1	ABIA	10,966	11,331	12,423	12,152	12,431	2.5	2.5	3.4	2.5	2.1
2	ADAMAWA	10,745	11,129	12,005	*15	18,259	2.9	2.5	3.2	-	3.1
3	AKWA-IBOM	11,662	11,842	13,106	18,097	18,661	2.7	2.7	3.5	3.7	3.2
4	ANAMBRA	13,795	13,824	13,967	12,355	13,076	3.2	3.1	3.8	2.5	2.2
5	BAUCHI	9,647	9,754	13,466	12,463	15,497	2.2	2.2	3.6	2.5	2.6
6	BAYELSA	3,595	3,950	4,586	4,846	6,314	0.8	0.9	1.2	1.0	1.1
7	BENUE	13,176	13,534	13,848	16,345	23,433	3.0	3.0	3.7	3.3	4.0
8	BORNO	10,179	10,390	11,081	12,753	13,637	2.4	2.3	3.0	2.6	2.3
9	CROSS RIVER	12,326	13,369	15,791	15,769	16,044	2.9	3.0	4.3	3.2	2.7
10	DELTA	21,503	21,212	22,145	20,378	22,044	5.0	4.8	6.0	4.1	3.7
11	EBONYI	9,117	9,729	11,279	9,571	10,591	2.1	2.2	3.0	1.9	1.8
12	EDO	10,296	10,185	10,701	9,757	17,133	2.4	2.3	2.9	2.0	2.9
13	EKITI	7,921	8,434	8,811	9,657	10,261	1.8	1.9	2.4	2.0	1.7
14	ENUGU	12,286	12,212	12,161	12,086	12,550	2.8	2.7	3.3	2.6	2.1
15	GOMBE	6,656	7,339	9,438	8,022	9,167	1.5	1.6	2.6	1.6	1.6
16	IMO	12,660	13,014	13,897	14,454	16,880	2.9	2.9	3.8	2.9	2.9
17	JIGAWA	9,395	10,047	11,286	11,212	13,368	2.2	2.6	3.1	2.3	2.3
18	KADUNA	9,135	11,077	14,881	21,500	31,090	2.1	2.5	4.0	4.4	5.3
19	KANO	19,145	19,670	21,712	23,514	25,868	4.4	4.4	5.7	4.8	4.3
20	KATSINA	12,621	13,037	14,606	14,436	18,101	2.9	2.9	3.9	2.9	3.1
21	KEBBI	6,764	7,146	8,624	8,804	10,840	1.6	1.6	2.3	1.8	1.8
22	KOGI	13,011	13,289	14,096	11,887	17,393	3.0	3.0	3.8	2.4	2.9
23	KWARA	10,866	11,035	12,118	14,412	14,356	2.5	2.5	3.3	2.9	2.4
24	LAGOS	17,589	17,768	18,040	20,387	29,864	4.1	4.0	4.9	4.1	5.1
25	NASARAWA	11,432	11,626	12,385	11,272	10,021	2.6	2.6	3.3	2.3	1.7
26	NIGER	13,920	13,812	15,739	17,472	23,556	3.2	3.1	4.3	3.6	4.0
27	OGUN	17,529	18,199	19,159	19,042	17,607	4.1	4.1	5.2	3.9	3.0
28	ONDO	12,008	12,573	13,793	14,821	11,492	2.8	2.8	3.7	3.0	1.9
29	OSUN	15,822	15,459	15,895	16,326	14,262	3.7	3.5	4.3	3.3	2.4
30	OYO	28,446	29,588	30,798	29,066	31,474	6.6	6.6	8.3	5.9	5.3
31	PLATEAU	15,943	16,474	17,526	17,926	18,938	3.7	3.7	4.7	3.6	3.2
32	RIVERS	8,885	8,553	8,321	9,602	9,368	2.1	1.9	2.2	2.0	1.6
33	SOKOTO	9,601	9,970	11,343	12,554	17,956	2.2	2.2	3.1	2.6	3.0
34	TARABA	8,426	9,507	10,138	10,013	17,608	2.0	2.1	2.7	2.0	3.0
35	YOBE	5,565	6,409	7,663	7,330	7,789	1.3	1.4	2.1	1.5	1.3
36	ZAMFARA	5,310	5,163	5,612	5,882	6,722	1.2	1.2	1.5	1.2	1.1
37	FCT ABUJA	4,155	4,755	5,725	5,573	7,390	1.0	1.1	1.5	1.1	1.3
	<b>TOTAL</b>	<b>432,098</b>	<b>446,445</b>	<b>369,988</b>	<b>491,565</b>	<b>591,041</b>					

\*Incomplete Returns.

Source: Baseline Data 2001 and Digest of Statistics (UBEC) 2005.



## 2.6.5 Number of unqualified teachers

### Unqualified teachers in Nigerian public school system

As at January 2005, there still existed a large pool of sub grade-two teachers in the system. Statistics on teachers in the 60,119 public schools with a total enrolment of 31.8 million pupils nation-wide (FOS, 2004) shows the following:

Graduates with teaching Qualification	33,754
Graduates without teaching Qualification	6,257
NCE teachers	247,270
Grade I Teachers	17,782
Grade II Teachers	151,185
HSC	9,910
WASC	46,397
Others	78,468
Total	591,023

Source: FME/UBE, Abuja (National School Census, Primary Education Statistics, 2003).

Source: Federal Republic of Nigeria (2005) *Teachers for the Future: Meeting Teacher Shortages to Achieve Education For All*.

# **3. Chapter three: case study of South Africa**

## Introduction

South Africa's education system has seen drastic post-apartheid reforms. Since 1994, the Government of South Africa (GoSA) has sought to use education to redress a legacy of racial and social divisions and align itself with international educational standards by meeting Education for All (EFA) goals. A key component of reform was reclaiming and reorganising inherited teacher training systems which lacked the capacity to redress persistent and ingrained inequalities. The objective was to ensure an equal access to good quality teachers who can become active agents of change in schools and equip graduates with the skills and qualifications to be competitive in the 21<sup>st</sup> Century job market. This was supported by deracialisation of the teacher education system so that all trainees had access to quality training. This case study provides an overview of South Africa's teacher education policies from 1994 to present, and their impact on improving quality, access and equity in education.

### 3.1. Methodology

#### 3.1.1. The aim of the study and the South African context

The aim of this case study is to provide an analysis of the efficiency and effectiveness of policies and practices instituted to address the teacher gap in achieving EFA in South Africa. Specifically, this study reviews South African policies related to teacher education, retention, development, working conditions and the role of the private sector and their impact on quality, access and equity<sup>23</sup> in education.

South Africa is a particularly interesting case for study as its post-apartheid legacy has led to the challenge of reclaiming an entire education system in addition to the usual demands of meeting EFA goals in any middle-income developing country. Teacher education policies introduced since 1994 encourage ideologies and practices that are directly opposed to those previously in place. Policies have shifted from seeking to divide to seeking to unify; and from retaining central power to devolving decision-making authority to school level and involving teachers, as key educational stakeholders, in the teaching and learning process. South Africa is also remarkable as certain reform choices go against international trends, for example the move away from specialised teacher training systems to merging colleges with Higher Education Institutions (HEIs; Sayed, 2004). The South African context is unique in the scale and scope of change at all levels of policy reform and implementation.

#### 3.1.2. Data collection

This is a desk-based review, and the analysis has been guided by an extensive review of literature that includes the following types of documents:

1. Government publications on teacher education policy and programmes, including legislation, white papers, country reports, education plans and reviews. These were retrieved from the Department of Education's (DoE's) online archive, which has a comprehensive collection of documents published since the 1995 'White Paper 1' (which provided the original basis for post-apartheid educational policy reform);
2. Published articles, books and conference papers on teacher education in South Africa. These were found by undertaking an in-depth search of relevant academic

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<sup>23</sup> Within the case study the following definitions are used:

- a) *Access*: strategies to increase physical access to schooling for all, and to increase the number of teachers;
- b) *Quality*: impact on learner achievement (measured predominantly through test scores) and increase in the quality of teaching;
- c) *Equity*: the extent to which policies sustainably and materially improve the conditions and life chances of the marginalised, and ensure greater representation in the teaching force from marginalised groups.

journals in the fields of international education, teacher education, development and law. In certain cases documents focused on countries other than South Africa as 1) many policy issues that are relevant at regional or international levels overlap with the current national context, and 2) certain documents provide comparisons between South Africa and other countries (in particular within the region), which added depth to the contextual analysis; and

3. Non-academic literature from development agencies, including the Organisation for Economic Co-operation and Development (OECD), the United Nations (UN) agencies and the World Bank.

Documents on policies with an indirect impact on teacher education (such as Outcomes-Based Education (OBE) curriculum policies) were also analysed. As most reforms have occurred since 1994, documents published previously were not considered relevant and were not reviewed.

### **3.1.3. Limitations**

While all efforts have been made to produce a comprehensive, reliable and accurate analysis, four limitations are acknowledged:

1. An inadequate Education Management Information System (EMIS) meant that certain baseline data necessary to assess increases in access, quality and equity effectively was lacking. For example, certain provinces lack accurate information on the number of teachers employed in each school and province.
2. Being a desk-based review, the study is limited to a literature review and is not supplemented by interviews or questionnaires. To provide a balanced and accurate view, key stakeholders were involved in producing the report to verify the findings. This provided a form of triangulation between key experts in teacher education policy with sources within the South African education system and other researched materials.
3. Numerous reforms have been introduced since 1994, often shortly one after the other or even concurrently. While much has been published on educational policy in South Africa, what is lacking is information on the impact of specific government objectives, and teacher education policies. Rather, there is a plethora of fragmented policy documents. Efforts to simplify and unify the system are evident in the 2007 'Teacher Policy Framework', but most of the present analysis is based on earlier policy reforms. It is difficult in this context to attribute change in educational indicators to a single policy and/or set of reforms.
4. Teacher training during and after apartheid is very different. The impact of post-apartheid training is difficult to generalise owing to the varied experiences and baggage each teacher brings to their professional practice.

## 3.2. The South African Education System

### 3.2.1. Country context: South Africa's socio-economic profile

South Africa is still recovering from divisive apartheid legislation that restricted non-white economic participation, and stunted the country's economic, political and social growth. Post-apartheid economic reform sought to 'create an outward-oriented economy going hand-in-hand with efforts to improve social equity and income distribution' (Amoateng and Richter, 2007, p6). Reforms have been successful in certain respects: GDP grew 4.2% in the third quarter of 2005 (its best performance in over 20 years) and over a million new jobs were created between 1995-1999 (Poswell, 2002). Social spending increased and took a pro-poor focus, with equity and democracy its central concerns. However, projected private investment failed to materialise. Overall, official unemployment rose by 10% between 1994 and 2001 (Arora and Ricci, 2005), and inequality between the top 10% and the bottom 20% of the population increased (Seekings, 2007). South Africa's Gini Coefficient clearly indicates the level of inequality, as demonstrated in Table 3.1 below.

Table 20.1: South Africa Gini coefficients: 1996-2007

Year	1996	2001	2007
Gini Coefficient	0.69	0.77	0.578

Sources: HSRC (2004); UNDP (2009)

The Gini coefficients shown in Table 1 demonstrate an initial increase in inequality, and that although the gap has decreased it is still at an unacceptably high level.

Indicators of inequality are evident in South Africa, and children are severely affected. The South African Index of Multiple Deprivation of Children shows 49 municipalities to be severely affected by vulnerability during childhood.<sup>24</sup> Moreover, inequality seems to have deteriorated with economic growth in the decade prior to the recession, with the income of the richer segment of society improving at a faster rate than that of other groups.<sup>25</sup> Also, there are considerable capacity constraints in the provision of basic services. This has been publicly evidenced in the spate of service protests and riots that erupted in townships across South Africa during the course of the year, as well as the recent strikes in the public sector including teachers. Centralised structures for the delivery of several basic services appear to have reached their capacity limits.<sup>26</sup> Currently, there is insufficient data to draw conclusions on the impact of the recession in South Africa. This will require ongoing monitoring, as further inequality has the potential to engender further public protests.

Demographically, South Africa has maintained the apartheid system of racial classification. Although categorising people into the 'White', 'Indian', 'Coloured' or 'African' racial groups allows the GoSA to track progress in increasing equity, this is still indicative of a persistent failure to move away from racially divided government systems. As these categories are used in government documents, statistical sources, policies, and journal articles, they are also used in the current case study. Table 3.2 provides an overview of South Africa's demographic profile.

<sup>24</sup> Department of Social Development (2009). The South African Index of Multiple Deprivation for Children 2007 at Municipality Level.

<sup>25</sup> The Presidency (2009). Development Indicators 2009.

<sup>26</sup> World Bank (2008). Accountability in Public Services in South Africa: Selected Issues, Pretoria.

Table 21.2: The demographic profile of South Africa

Black African	35 416 166
Coloured	3 994 505
Indian or Asian	1 115 467
White	4 293 640
TOTAL	44 819 778

Source: Statistics South Africa (2003, p10)

South Africa is a middle-income country, and ranks 129<sup>th</sup> out of 182 countries on the Human Development Index (HDI). This HDI score is low in relation to South Africa's GDP (\$9,757): Namibia has the same score but almost half the GDP (UNDP, 2009). Although 22% of the population lives below the income poverty line (\$2 a day), this is a drop in comparison to 38% in 2000 (UNStats, 2010). Life expectancy remains low in South Africa, at 51.5 years. HIV and AIDS is a serious concern, with overall HIV incidence at 11% (Avert, 2010), and South Africa amongst the ten countries with the highest incidence rates in the world (UIS, 2006). Ethnic-, gender- and age-related inequalities are discernible, with the highest incidence rates found amongst 15- to 49-year-olds (16.9%), women (13.6% compared to 7.9% of men) and Africans (13.6% compared to 0.3% of whites; Avert, 2010). In comparison to other African countries, South Africa has a relatively strong economy and high social indicators, but lags behind on equity indicators.

Political support for policy reform has been high. South Africa held its fourth democratic election on April 22, 2009. President Jacob Zuma in his State of the Nation Address identified ten priority areas, which form part of the Medium Term Strategic Framework (MTSF) for 2009 to 2014. These are broadly stated as creating jobs; enhancing the quality of education; improving health outcomes; emphasizing rural development; and fighting crime and corruption.

South Africa is on track to meeting the objectives of Education for All. The past 15 years have seen increased enrolment both at the upper and lower ends of the system. Gross enrolment rate is 98 percent in primary and 85 percent in secondary phase in 2008. The gender parity index is 0.98 and 1.08 in primary and secondary school respectively suggesting that girls and boys have equitable access to education.<sup>27</sup> Access to ECD and reception-year (Grade R) has been prioritised and expenditure is set to increase over the medium term.

South Africa spent 5.4 percent of GDP and 17.6 percent of total government expenditure on education in 2008/09.<sup>28</sup> However, educational outcomes have not matched the large investments. South Africa's consistently poor performance against a range of national and international benchmarks shows that much still needs to be done to improve quality in education. For example, a systemic evaluation conducted among Grade 3 students in 2007 found very low average scores of 36 percent in reading and 35 percent in numeracy. In the same year only 50 percent of the candidates for Senior Certificate passed the required test.<sup>29</sup>

Progress towards achievement of the Millennium Development Goals (MDGs) is uneven. Universal access to primary education and gender equity (MDGs 2 and 3) are goals towards which substantial progress has been made. However, quality of education remains a

<sup>27</sup> Department of Education (2008): School Realities 2008.

<sup>28</sup> Based on National Treasury (2009) Medium Term Budget Policy Statement.

<sup>29</sup> Department of Education (2009). Trends in Education Macro Indicators.

concern despite the big investment in the sector – 5.4 percent of GDP and 17.6 percent of the total Government expenditures in 2008/09.<sup>30</sup>

For the 2010 school year alone, the Government has committed an additional allocation of 524 million Rand to address the quality of education particularly in the foundation phase through provision of workbooks for grades 1 to 6 in the poorest 60 percent of schools.<sup>31</sup>

### 3.2.2. Structure of the education system

South Africa's schooling system is divided into 12 grades, catering for children of six to 18 years of age. Grades 1 to 9 are compulsory, and no learner can be denied access up to Grade 12 (DoE, 2008a). The system is divided into three bands:

- General Education and Training (GET): Composed of Reception to Grade 9, as well as an equivalent Adult Basic Education and Training (ABET) qualification;
- Further Education and Training (FET): Grades 10-12 and education and training within the National Qualifications Framework (NQF) Levels 2 to 4; and
- Higher Education (HE).

Most learners are under the provision of the public schooling system, but 3% are enrolled at independent institutions (DoE, 2008a). The public education system accommodates '12.3 million learners, 387 000 educators, 26 592 schools, 2 278 ABET centres, 50 public FET institutions, 4 800 Early Childhood Development centres and 23 HE institutions' (DoE, 2008a, p2).

### 3.2.3. Post-apartheid education policy frameworks

As is appropriate in view of wider socio-economic reform, the GoSA has made significant changes to education policy frameworks and institutional policy since 1994. Those frameworks and policies with direct or indirect implications for teacher education include:

Policy frameworks:

1. **Education White Paper 1** (DoE, 1995) was the first official policy document published by the African National Congress (ANC). The document sets out education policy in line with the new Constitution, with a focus on equitable systems and a new focus on outcomes-based learning;
2. **Education White Paper 2** (DoE, 1996a) formalises devolution of power over recruitment systems, by stipulating that appointments would be made by provincial education departments, in consultation with school governing bodies (SGBs);
3. **The National Education Policy Act** (DoE, 1996b) is authorised the Minister of Education (MoE) to govern teacher training guidelines (including accreditation requirements, certification processes and teacher education curricula);
4. **South African Schools Act** (1996c) revoked all apartheid education legislation;
5. **The new National Curriculum Statement (NCS)** replaced 'Curriculum 2005' (C2005) introduced by the government in 1997. C2005 was designed to transform teaching and learning by implementing an OBE system, focused on student-centred practice. A review of C2005 revealed that many teachers struggled with the jargon used and

<sup>30</sup> Based on National Treasury (2009) Medium Term Budget Policy Statement.

<sup>31</sup> National Treasury (2009). Medium Term Budget Policy Statement

found the curriculum difficult to apply in practice. Following this the NCS was launched in 2002 as a concise, user-friendly version of C2005;

6. **'The Norms and Standards for Teacher Education' (DoE, 1997a, in Sayed, 2002)** provide guidelines for teacher education competencies and advocate the use of OBE in teacher training;
7. **The Higher Education Act (DoE, 1997b)** gave the MoE the power to merge specialised colleges with university programmes;
8. **The Conditions of Service** include the Employment of Educators Act (GoSA, 1998) and allow civil society and stakeholder organisations to be involved in policy formulation (teacher unions, student bodies);
9. **Teacher Education Policy Framework (2007)** outlines policy for teacher recruitment, retention and development. The framework focuses on teacher competencies, continuing professional teacher development (CPTD), minimum qualification standards, and the social standing of teachers (DoE, 2007);
10. **National Teaching Awards** were launched in 1999 to celebrate excellence in the teaching profession (DoE, 2009). Finalists at regional, provincial and national levels receive certificates, and schools receive cash incentives;
11. **The Integrated Quality Management System (IQMS)** is a performance-related appraisal system designed to improve teacher development and increase educator accountability.

Institutional policy:

1. **The South African Council of Educators (SACE)** is the statutory body for professional educators that governs teacher registration, discipline and professional development (see Appendix 3.6.3 for SACE functions).
2. **The South African Qualifications Authority (SAQA)** provides the foundations for the NQF. From 2001 to 2008 the NQF was restructured to provide a simpler, integrated framework of qualifications to improve quality assurance (DoE, 2008). The bodies charged with quality assurance in formal educational institutions (schools, adult education centres, FET colleges and HEIs) are the Umalusi Council for Quality Assurance in General and Further Education and Training and the Council on Higher Education (CHE). These previously existed as statutory bodies and report to the MoE.
3. **The Ministerial Committee on Teacher Education** has the remit of analysing how the government can improve teacher education policies and programmes to ensure effective teacher education programmes are in place that adequately prepare teachers and ensure equitable distribution of personnel (DoE, 2003).

Policy can be categorised into four areas of focus: 1) strengthening quality assurance and governance mechanisms; 2) simplifying previously divided and compartmentalised systems; 3) implementing curricula aligned with post-apartheid values that impart skills to transform teaching and learning; and 4) increasing efficiency and cost effectiveness. Also evident is that although much decision-making authority is devolved to school and provincial levels, the state retains the overall power for setting the legislative norms and standards applied to all schools.

#### **3.2.4. Access, enrolments and quality**

In order to negate the legacy of apartheid, meet its educational objectives and align itself with international EFA and Millennium Development Goals (MDGs), the GoSA has



drastically reformed educational policy and legislature since the mid-nineties. Table 3.3 gives an overview of educational provisioning during and apartheid.

Table 22.3: *Per-capita expenditure on education and pupil-teacher ratios according to racial groups 1984-2001*

White				Indian			
PCE <sup>32</sup>		PTR		PCE		PTR	
1984	2001 <sup>33</sup>	1987	1997	1984	2001	1987	1997
R1211	R3857	18: 1	27: 1	R711	n/a	24: 1	28: 1
Coloured				African			
PCE		PTR		PCE		PTR	
1984	2001	1987	1997	1984	2001	1987	1997
R498	R3,613	33: 1	32: 1	R146	R3,002	46: 1	37: 1

Source: Adam and Moodley, 1986: 236; Byrnes, 1996; Taylor et al., 2008:22; Fiske and Ladd, 2005

The table indicates that although there has been greater equalisation of spending to redress inequalities entrenched in the apartheid education system, by 2001 previously white schools continued to take the lion's share of spending per pupil. Previously disadvantaged schools, continued to receive lower funding, had higher PTRs and a lower percentage of qualified teachers. Lower PTRs and numbers of un- and/ or under-qualified teachers in large part account for higher spending in previously white schools, at around 28% higher than previously African schools (Fiske and Ladd, 2005).

Although difficulties persist, substantial progress has been made in implementing equalising policy reform. The South African Schools Act of 1996 revoked all apartheid education legislation and the GoSA created 'non-discriminatory school environments into which access was gained on the basis of criteria other than race or religion' (Jansen and Taylor, 2003, p2). This was accompanied by increased spending on education, with four underlying priorities forming the basis for budget reform: 1) addressing the question of equity; 2) reducing unit costs and raising productivity levels; 3) redesigning the user charge system and meeting free compulsory education for all goals; and 4) establishing new funding partnerships (DoE, 1996, p26). Educational spending increased from R30 billion to R101 billion between 1994/95 and 2007/08, equal to an increase of 20% in real terms (The Presidency, 2008). Government expenditure on education constitutes 5.59% of Gross National Product (GNP), within the average expenditure in developed countries (between 5% and 6%). However, spending increases vary from national to local levels and the proportion of provincial budgets' educational spending has decreased<sup>34</sup>, for example in the North West Province from 48% in 2002/03 to just over 40% in 2008/09 (The Presidency, 2008).

Increased spending and policy reforms have led to greater access and enrolment. Between 2001 and 2006, the number of learners enrolled in schools grew by 4.7% and the number of teachers by 8.9% (DoE, 2008). Introducing a reception year resulted in 62.1% of five-year-

<sup>32</sup> Per Capita Expenditure on Education

<sup>33</sup> Removal of racial segregation means recent data gauging the exact spending per student according to race is difficult to ascertain. The 2001 data is based on findings in the Western Cape, according to schools' previous educational departments. Although not as exact a measure, schools have remained predominantly segregated in spite of policy reform and the overwhelming majority of pupils remain divided according to previous racial intakes: 100% of pupils in previously African schools, 93% of pupils in Coloured schools and 66% of students in White schools (Fiske and Ladd, 2005)..

<sup>34</sup> Apart from two provinces, the Free State and the Northern Cape.

olds being enrolled in schools in 2006. South Africa has a high gross enrolment ratio (GER) at primary and secondary levels, as shown in Table 3.4 below.

Table 23.4: GER in South Africa 1994-2005 by level of education

Year	Primary	Secondary
1994	122	84
1997	125	90
2002	105	81
2005	103	89

Source: Taylor et al. (2008, p28)

Although Table 4 reveals an overall decrease in GER at primary levels, this is mainly due to lower numbers of over-age students entering grade 1 and repeating until they reach the required level to enter grade 2 (Taylor et al., 2008). This reduction is a positive indication that the age grade admission policy (DoE, 1998a in Taylor et al, 2008), that requires students to enrol in grade 1 the year they turn 7 has been successful in increasing age-appropriate enrolments at the primary level. Table 3.5 below highlights that participation has increased for each age cohort between 2002-2007.

Table 24.5: Enrolment in school by age

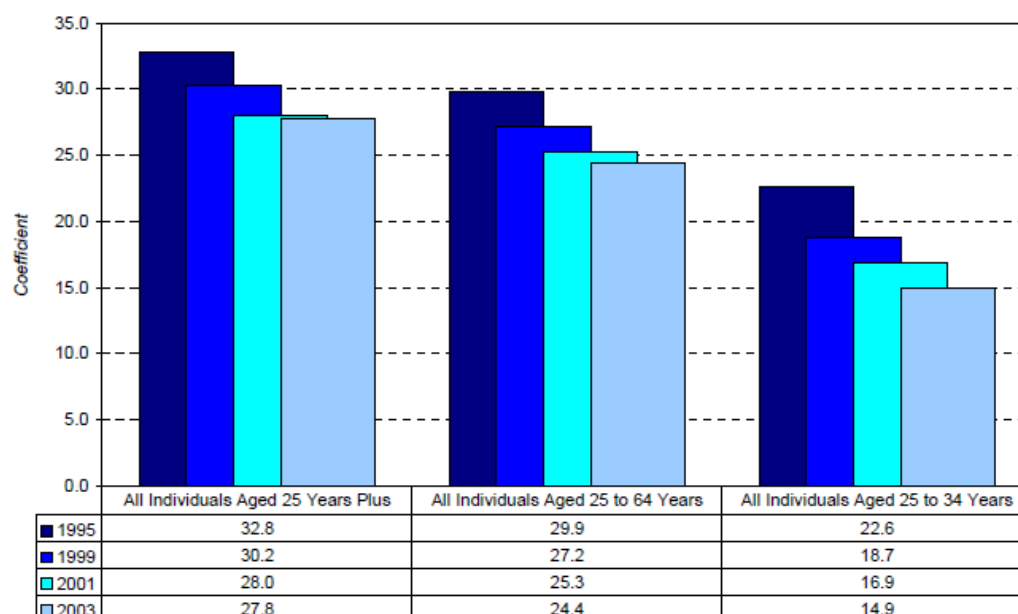
Age	2002	2007
Five-year-olds	40.00%	60.00%
Six-year-olds	70.00%	88.00%
Seven- to 15-year-olds	96.00%	98.00%

Source: Statistics SA, General Household Survey 2007

Gender parity can be considered achieved at primary *and* secondary levels of schooling. Although slightly more males are enrolled at primary levels, adolescent girls account for only 41% of out-of-school lower secondary students (UIS, 2010). The proportion of African, Coloured and Asian learners completing Grade 12 has increased significantly (DoE, 2006). Efforts to expand and achieve greater equality in the tertiary sector led to the rise of HE enrolments from 300 000 in 1986 to 750 000 in 2005, with the number of African students doubling. However, African students remain a minority in HE, accounting for only 12% and 13% of 20- and 24-year-olds, respectively.

Putting a pro-poor policy in place and weighting funding in favour of disadvantaged schools have led to greater equality in spending. Figure 3.1 shows the Years of Education Gini Coefficient scores between 1995 and 2003.

Figure 4.1: Years of Education Gini Coefficient scores between 1995 and 2003



Source: OHS 1995, OHS 1999, LFS 2001 and LFS 2003 (Statistics South Africa, in DoE, 2006, p58)

The yearly decrease since 1995 indicates greater equality in education across all age groups. However, the GoSA has struggled with *free* education for all, and has not abolished its fee-paying system. The government posits that reduced funding would lower the quality of public education, and widen inequalities as richer parents moved their children to independent schools. In attempts to balance international goals to provide free education for all with national budgeting needs, a 'no-fee schools' policy was introduced in 2007, which categorised schools into five 'quintiles' each comprising 20% of schools. The lowest two quintiles allow learners to enrol without paying fees, and the GoSA makes up the shortfall. The GoSA proposes to expand this to Quintile 3 schools, so that 60% of learners are in no-fee schools. Interestingly, the Western Cape has initiated plans to abolish fees for all quintiles over a number of years (OECD, 2008). Ten per cent of poor students in the richest two quintiles also receive government funding.

The greatest challenge to the education system relates to quality and equity. South Africa has lowered pupil-teacher ratios (PTRs) from 34:1 in 1994 to 31:1 (UIS, 2009), but relatively low PTRs veil disparities. Many independent and richer schools have PTRs in the low twenties, whereas those in rural areas can reach PTRs of 80:1. Educational inputs have resulted in disappointing outputs in terms of learner achievement in national and international tests. The DoE (2007b) considers increasing the quality of teachers as key to improving quality and equity in schools and places a huge priority on developing teacher policy. Unlike other countries, the GoSA does not officially recruit contract teachers. However, SGBs who raise their own funds can employ teachers on contract. As they are privately employed, this matter remains between SGBs and schools, and there is little available data on these teachers. Therefore, it is not a feature of analysis.

### 3.2.5. Overview of the teacher education system

The South African teacher education system is separated into two areas: Initial Professional Education of Teachers (IPET) and CPTD. All teacher education courses are subject to the 'Norms and Standards for Educators' (see Appendix 3.6.1 for the 'Norms and Standards'),

which require teachers to develop content knowledge and pedagogical skills and to be reflexive practitioners. To be registered as an educator with the SACE, teachers must take a recognised IPET course in one of three ways. The first two are pre-service methods, whereby teachers train prior to becoming employed. This can be achieved by taking a four-year Bachelor of Education (BEd) degree, which includes the equivalent of one-year's teaching practice. Alternatively, students can graduate from other degree pathways, followed by a post-graduate certificate in education (PGCE). The PGCE is offered as a one-year full-time course, or over two years part-time. PGCE programmes also feature periods of practical placements in schools. The PGCE assumes that students have basic general academic skills and knowledge, as they already have an undergraduate degree. The third option, the Advanced Certificate in Education (ACE) is offered as an in-service training programme for teachers in schools. The ACE allows teachers to upgrade three-year qualifications into the required four-year qualification over two years of part-time study, and to specialise in Maths, Science or Technology.

The DoE has developed a flexible system of study methods for BEd and ACE programmes, including studying part-time, distance learning (for mature BEd students), and a mixture of distance learning and supervised practice. This makes studying available to a wider range of trainees, as well as reducing learner costs. In 2006, the SACE created a school-based training programme, so that teachers are in schools from early stages. This can potentially give trainees a more realistic perspective of teaching, as teaching not meeting expectations is a common reason for leaving the profession in countries such as England (Smithers and Robinson, 2003). In South Africa, teachers are seen as the foundation for quality education, and effective IPET as key to competence and professionalism (DoE, 2007).

CPTD is recognised as vital for translating policy reforms into effective practice, to ensure that teachers can implement the new curriculum, use technologies, and cater for a varied student intake. The 2007 Teacher Education Policy Framework states that national and provincial departments of education (PDEs) are 'obliged to provide an enabling environment for the preparation and development of teachers to take place' (DoE, 2007). The SACE retains overall responsibility for CPTD implementation, management and quality assurance (DoE, 2007, p18). Teachers being proactive about CPTD opportunities, reflective practice, strong leadership and flexible, effective support systems at district, provincial and national levels are considered key to effective CPTD. Expectations are that teachers earn a specified number of Professional Development (PD) points within a three-year cycle on SACE-approved activities (some compulsory). Programmes can be led by schools, employers, or other organisations (e.g. Non-Governmental Organisations (NGOs), teachers unions) or can be self-chosen (DoE, 2007, p18).

Challenges to increasing quality education for *all* learners through effective teacher education are severe and chronic. South Africa's teacher education policy was developed in light of an inherited 'skewed distribution of teacher qualifications, inappropriate linking of salary levels to qualifications, and disparities in learner: teacher ratios' (DoE, 2005a, pp. 63-64). Pre-1994, teachers were paid less by certain departments although they possessed the same qualifications, females were paid less than males and white teachers were paid more than other racial groups. Teacher salaries were equalised in 1996/97, and aligned with salary scales of former white education departments, which meant that 40% of teachers moved into a higher pay bracket (Jansen and Taylor, 2003). South Africa is the country in the sub-Saharan region with the highest disparities in the educational level of its teachers, with the highest level of teachers with tertiary education, and also the highest proportion with only primary level education (Bonnet, 2007). Upgrading teachers is central to redressing persistent inequalities and increasing the quality of teaching and learning, which has led to a

plethora of reforms. Since 1994, teachers have experienced huge changes: a new curriculum, a unified national teacher body and a more varied racial and socio-economic body of students and educators in classrooms and training institutions (DoE, 2007). These factors affect teacher education, as new skills are required to prepare new teachers adequately and align those already in the system with reforms. Challenges for the MoE and teacher training institutions include:

1. A persistent supply-demand mismatch: There is an oversupply of teachers in certain provinces and curriculum subjects but shortages in African languages, Mathematics, Technologies and Science. Rural areas and the foundation and intermediate phases of education suffer from 'qualitative and quantitative shortages' (DoE, 2005a, p10). Insufficient teachers are being trained to support learners with special educational needs. Teacher attrition could increase as the social standing and authority of teachers have declined, leading to lower job satisfaction and perceptions that teaching is neither a lucrative nor respected career, in turn lowering the number of students enrolling in teacher education programmes (Hammett, 2008).
2. The impact of HIV and AIDS: Jansen and Taylor (2003) argue that HIV and AIDS can affect education policy reform on four fronts: 1) decreasing participation gains as access to primary, secondary and tertiary education as students die or drop out due to personal or family illness; 2) decreasing quality gains, as increasing numbers of teachers leave the profession due to illness or death; 3) decreasing economic gains; as the pool of HE qualified graduates decreases and 4) decreasing equity gains as certain populations are disproportionately affected. HIV testing of over 17 000 teachers revealed prevalence rates of 12.7%, with the highest rates amongst younger teachers and teachers in rural areas (CSA, 2005). The lack of accessible medical services in rural areas increases teacher reluctance to relocate (Mulkeen and Chen, 2008). There is a correlation between higher HIV prevalence and lower quality indicators: Limpopo, Mpumalanga and the Eastern Cape have the highest HIV and AIDS prevalence rates and also the highest PTRs (over 60% of classes have over 46 pupils per teacher; CSA, 2005). Crouch (2001, p2) suggests that addressing the HIV/AIDS-related imbalance in teacher supply and demand is possible, but very challenging. Some 30,000 new teachers per year would have to be trained'.
3. The 'apartheid legacy': Most educators in schools were trained and worked during the apartheid period (DoE, 2005a). In addition to the volume of training required, policies must take into account teacher resistance to reforms (such as performance assessment) reminiscent of apartheid systems.
4. Difficulties in translating increased spending and policy reforms into results: Teachers' lack of conceptual and subject knowledge has a negative impact on learner achievement (DoE, 2007). Little impact has been achieved on the quality of teaching and learning or learner achievement.
5. Entrenched inequalities: Teacher shortages are most severe in rural areas. In disadvantaged areas, many teachers are under-qualified, and encounter high PTRs, inadequate resources and poor professional development systems (DoE, 2005a).
6. Gender inequalities: Women account for over two-thirds of personnel, but are disproportionately represented in education management positions (DoE, 2007).

Additionally, while factors affecting demand (PTRs, number of curriculum subjects) remain comparatively stable, South Africa's ability to anticipate and regulate supply is affected by the following (DoE, 2007):

- 1) Increases in departures owing to mortality, retirement and medical incapacity in certain provinces, in particular amongst young women;

- 2) Migration of families from rural to urban areas, which increases demand in certain provinces and reduces it in others;
- 3) An additional 126 000 previously excluded children now enrolled in school; and
- 4) Teachers leaving South Africa to teach in other countries (unpublished article). Many South African teachers opt to teach in countries such as England, while there has also been an influx of teachers from neighbouring Zimbabwe, who are not recognised as qualified teachers. To address this, South Africa decided to work with other countries on issues relating to teacher recruitment, retention and development. South Africa is a member of the Commonwealth working group on Teacher Recruitment, which developed the 2004 Teacher Recruitment Protocol (Commonwealth Secretariat, 2004). The Protocol has the aim 'to balance the rights of teachers to migrate internationally, on a temporary or permanent basis, against the need to protect the integrity of national education systems, and to prevent the exploitation of the scarce human resources of poor countries. The Protocol also seeks to safeguard the rights of recruited teachers and the conditions relating to their service in the recruiting country' (Commonwealth Secretariat, 2004). South Africa is also a member of the Commonwealth Advisory Council on Teacher Mobility, Recruitment and Migration, set up in 2009 to promote and raise awareness of the 2004 Teacher Recruitment Protocol (Commonwealth Secretariat, n.d.). Activities the group is involved in include publishing a working document on equivalent qualifications between countries, to help national agencies ascertain the suitability of migrants to teach, and maximise the pool of teachers in shortage countries (Commonwealth Secretariat, 2010).

South Africa's teacher education policy seeks to increase the number of graduates entering IPET, ensure IPET graduates enter the profession, retain teachers in schools, and address supply-demand disparities. These objectives should be supported by increasing the information base on the numbers of teachers available, such as those from other countries. The DoE (2007) has pledged to meet recruitment demands by:

1. Increasing the funding available to student teachers;
2. Conducting an advocacy campaign designed to raise the status of teachers;
3. Basing human resource practices on providing adequate career progression and conditions of service; and
4. Increasing government capacity for monitoring and projecting supply and demand needs by establishing a national electronic database in collaboration with PDEs and universities.

### **3.3. South Africa's teacher policy: increasing access, quality and equity in education?**

Many policies have been implemented in South Africa around issues of teacher education, retention and deployment since 1994, as evident in Section 2.3 above. Some are interrelated, as they are designed to address different problems within the South African education system: of inequality, access and quality. Therefore, it is logical to analyse policies independently from each other, according to the problems they are designed to resolve. This is particularly important in South African context for two reasons touched upon in the methodology: 1) there is a lack of overarching policy frameworks; and 2) the government has implemented reforms with the aim of overcoming apartheid inequalities, firstly, and of meeting EFA goals, secondly, meaning that EFA reviews that explicitly link progress to international goals are also lacking. Wherever possible within the study, the impact of each policy has been assessed according to themes, related to the main challenges they are designed to overcome. This section provides individual descriptions of policies (or areas of

linked policies) and the rationale behind them, and analyses their impact in terms of quality, access and equity and, where information is available, on cost effectiveness. Table 3.6 outlines the policies that are reviewed, and the principal goals they link to.

Table 25.6: Policies and goals reviewed in the case study

Government objective/EFA goal	Policies
Policies to improve access	<ol style="list-style-type: none"> <li>1. Restructuring the national training system</li> <li>2. Redeployment and recruitment policies to increase the number of teachers in disadvantaged areas</li> </ol>
Policies to improve quality	<ol style="list-style-type: none"> <li>3. OBE-focused curriculum</li> <li>4. Mainstreaming qualifications, upgrading skills and implementing effective CPTD systems</li> <li>5. The IQMS</li> </ol>

As the overall government objective of White Paper 1, and subsequent educational policy documents, has remained centred on redressing persistent racial, socio-economic and linguistic inequalities, equity is treated as an overarching, intrinsic theme rather than as a separate objective. It is also important to bear in mind that certain policies have both access and quality dimensions. For example, Policy 1 relates to access but has an impact on quality.

### 3.3.1. Policy 1: Restructuring the national training system

#### Policy context and rationale

To understand the reform, it is first necessary to contextualise the education landscape in 1994. Divisions were well established, with 19 education departments responsible for teacher education (each with their own education minister, curriculum, assessment and funding systems); 32 autonomous universities and technikons; and around 105 colleges of education (Sayed, 2002). Multiple, severely racially disaggregated curriculum and qualification systems were in place. Subjects available at most black universities and colleges were limited to humanities and arts, a ‘consequence of the underdevelopment of mathematics, science and technology in the secondary school system for the black population’ (Sayed, 2002, p). This was perpetuated as most graduates from black teacher training colleges were trained in arts and humanities. This negatively impacted on the curricula and the quality of education in schools in subjects such as Maths and Science. The system was disjointed, costly, and wasteful, with large areas of duplication and restricted access according to racial categories.

A main policy change in the mid-1990s was therefore the restructuring of the national training system, and merging of specialist teacher training colleges with university departments of education. This was undertaken to 1) regulate and increase teacher trainee supply; 2) improve professional training standards; and 3) reduce overall expenditures (Bennell and Sayed, 2009). Primary teachers were historically trained at colleges of education under provincial control, and secondary teachers at universities. Another perceived advantage was that being educated by university lecturers with advanced research and academic skills would feed into the curricula, and increase the efficiency of teacher education and the quality of teachers entering the profession (Kruss et al., 2008). This policy has international importance in view of trends towards globalisation and maintaining efficient, cost-effective structures. Merging goes against practice in countries such as France where teacher education has remained separate. It is noteworthy that in France, teachers are well regarded in society, supply outweighs demand and job retention is

higher than in countries such as England where teaching has been part of the HEI system for some time. Restructuring in South Africa took place in several phases (Kruss, 2008):

- Mid- to late 1990s: Initial internal restructuring within HEIs' education departments (which often led to the diminishing of 'the status and position of the education faculty' (p77);
- 2001: Colleges of education legislatively merged with HEIs;
- 2004: 'a process of mergers and partial incorporations was initiated to restructure the higher education landscape' (p77); and
- More recent restructuring, based on informed reviews of needs.

How mergers occurred and the level of partnership between institutions was dependent on the conditions at the institutions (Kruss, 2009, p80). The following types of mergers took place:

- A. Institutional obliteration: 'simple' mergers where one department was incorporated into another with little or no retention of staff. Only students already enrolled were retained;
- B. Complex successive waves of restructuring: externally imposed mergers involving 'two institutions with education faculties or schools that have recently incorporated colleges of education' (Kruss, 2009, p81). A number of college staff were retained and integrated. HEIs often maximised new staff expertise to develop BEd programmes. Strong leadership increased egalitarian partnerships between institutions. In other cases colleges ceased to operate, while HEIs benefited from funding provided by additional students;
- C. Incorporation: a method that presented problems as staff had different institutional values, training, experiences, and beliefs on teacher education. These had an impact on the content and theoretical grounding of education delivered and might result in discordant practices.

Changes often happened within five years, a short period of time for universities to assume sole responsibility for teacher education and adapt to reforms.

### **The impact of restructuring**

South Africa has largely been successful in increasing access to teacher education. There have been considerable increases in enrolments and number of graduates since 1994, and reductions in racial disparities<sup>35</sup> (Paterson and Arends, 2009). Restructuring the system has significantly impacted enrolments, to the extent that the pattern of teacher training has completely changed. The number of IPET enrolments has decreased substantially, while NPDE and ACE enrolments have increased (Kruss, 2009). There is concern that PGCE enrolments are low, and not meeting supply. Half of the teachers enrolled study part-time in distance education programmes, and only 2 100 graduated in 2006 (unpublished article). Almost half of graduates are white, and unlikely to teach in African rural and township schools, which experience the severest shortages. Also worrying is that many teachers relocate to other countries, such as England, as soon as they qualify. This is particularly harmful as these are the first generations of teachers trained after apartheid, with the potential to be effective, active agents of change. The OBE curriculum is more aligned with systems in developed countries, and has facilitated moves.

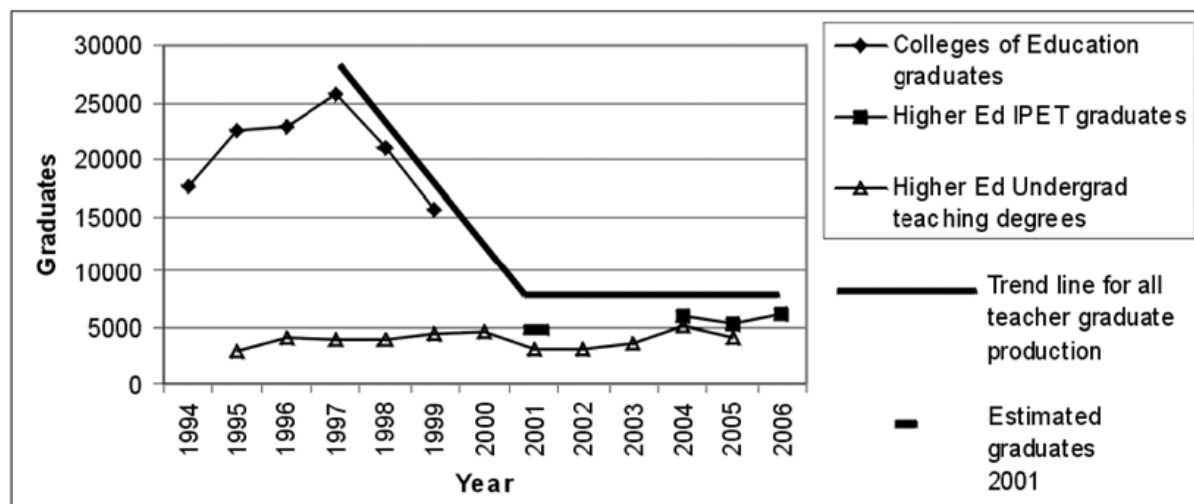
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<sup>35</sup> See Figure 3 for an overview of enrolment trends 1995-2003



Restructuring policies have been detrimental to supply and demand, as they correlate with a significant decline in IPET enrolments. Figure 3.2 provides an overview of IPET graduates at Colleges of Education and HEIs during and after the restructuring period.

Figure 5.2: IPET graduates for higher education and colleges of education 1994-2006



Sources: Crouch & Perry (2003: 482); Jaff et al. (1996: 12); Vinjevold (2001:8). All in Paterson and Arends, 2008.

Overall IPET graduate numbers greatly reduced, indicating that students who would have attended colleges of education did not automatically enroll in HEIs instead.

There has also been a negative impact on areas in the education sector with acute teacher shortages and certain specialisms. Specialist college departments becoming subsumed into larger HEIs can be harmful if diploma-level training strengths are lost (Bennell and Sayed, 2009). In South Africa, this is significant as colleges were principally responsible for primary levels of schooling. HEIs have tended to work to their strengths and focus on secondary levels (Sayed, 2002). For example, the University of Durban-Westville lacked specialism in junior primary pedagogy and focused uniquely on the intermediate and senior phases after revising its curriculum according to C2005 policies (Samuel, 2002). Mergers have negatively impacted on state capacity to 'train Grade R and Foundation Phase teachers, including the teaching of basic literacy and numeracy, and the role of mother tongue teaching at the early stages of schooling [...] the institutional capacity of the system to train Foundation and Intermediate Phase teachers has deteriorated' (DoE, 2005a, p10). However, there are also indications that in certain provinces institutions are attempting to redress imbalances; for example, in KwaZulu-Natal higher numbers of teachers are graduating in scarce subjects (DoE, 2005).

A Teacher Education Research and Development Programme (TEP) report (2008) notes that 'the lack of a strong institutional vision of how teacher education is meant to be is evident in the way that some faculties and schools were swept along by restructuring, responding in a reactive, short-term, narrow-interests manner that was ultimately potentially undermining to their own best efforts'. In several cases, incorporating staff from different institutions led to 'subtle racism, inter-site tensions and inferiority/superiority complex issues' (Kruss, 2009, p86), with clear negative impacts on equity: 'The danger for initial teacher education, of differences becoming solidified into stereotypical and prejudicial perceptions, was highlighted as a key challenge for faculties and schools to address at the micro level.' Gender and racial inequities remain prevalent, as is evident in the intake of BEd and PGCE students outlined in Table 3.7.

Table 26.7: BEd and PGCE enrolments by race and gender in 2006

<b>Bachelor of Education</b>					
	<b>Black</b>	<b>Coloured</b>	<b>Indian</b>	<b>White</b>	<b>Total</b>
<b>Female</b>	8 058	1 219	1 255	8 298	18 830
<b>Male</b>	4 420	464	208	1 780	6 872
<b>Total</b>	12 478	1 683	1 463	10 078	25 702
<b>Post Graduate Certificate of Education</b>					
	<b>Black</b>	<b>Coloured</b>	<b>Indian</b>	<b>White</b>	<b>Total</b>
	1 994	160	329	2 008	4 491
<b>Male</b>	30.80%	<b>Female</b>	69.20%		

Source: CHE (2009, in unpublished article)

There is a clear under-representation of men and Coloured and Indian students. Paterson and Arends (2008) examine the decline in young African women enrolled in teacher education courses since 1994. In 1994, students were mostly under 29 years of age (78%), African (89.1%) and female (65% to 80% overall and 98% of primary and junior teachers). Therefore 'colleges [...] were the base from which young African women entered the teaching profession as primary phase teachers' (Paterson and Arends, 2008, p284). Colleges were residential and provided accommodation to between 35% and 45% of trainees, which also suggests they 'served an important institutional role in making teacher education accessible to young rural students' (Paterson and Arends, 2008, p284). The majority of current HEIs are located in urban areas, and the decline in rural female African trainees may indicate that college closures reduced local options, and decreased equitable access to training. This could be compounded by higher HIV prevalence rates amongst young, female African trainees than any other group, which impact on income, illness and absenteeism (Kruss, 2009; Centre for Education Policy Development; CEPD, 2009).

While the number of teachers trained has increased, there are considerable inequalities in access and recruitment, and racial divides in student intake. This is a concern for the GoSA, given severe supply-demand issues in shortage areas. Completing a BEd is costly for most students, particularly as full-cost loans are no longer available. This puts rural students at a disadvantage as many HEIs are located in urban areas and they have the added cost of transportation and/or accommodation. To counter this, many HEIs use the fourth year of the degree as a year in school to reduce costs. Nonetheless, the tendency for individuals to seek alternative, cheaper modes of training and for schools with severe shortages to employ un- or under-qualified teachers threaten quality education (DoE, 2005a).

Procedures during mergers reveal a lack of equitable decision-making partnerships. Although provincial legislation stated that mergers would, 'after consultation with the councils of the colleges concerned, amalgamate two or more state-aided colleges of education subject to the conditions [the Member of the Executive Council for Education] may determine', teacher training colleges were insufficiently consulted (Nieuwenhuis and Mokoena, 2005, p131). Institutions' decisions to restructure according to what they considered best for their context were often ignored.

A Qwaqwa college's decision to choose a full autonomy option was rejected owing to insufficient funds to support the process, although the Framework for Implementation (DoE, 1998) states that colleges would have capacity-building assistance to work to this model. The college's second choice (to merge with two other campuses and be part of a multi-site

programme) was rejected on the same grounds, following which a third recommendation (to become a centre offering FET courses and expand to offer in-service training (INSET)) was also rejected, and the college told it had been 'earmarked for incorporation into an existing university' (Nieuwenhuis and Mokoena, 2005, p133).

College personnel were against this amid concerns that few staff would be retained and that job security would be low as universities had the green light to make staff cutbacks they considered necessary while restructuring. Also, the university's academic requirements were considerably higher, which would be problematic for most college staff (Nieuwenhuis and Mokoena, 2005). When the college shared these views the DoE decided it would be incorporated into a local university. This led to an almost complete breakdown of the relationship between the college and the DoE. The rector of the college withdrew 'from an active role in the process, leaving much of the negotiation with the department to the trade unions representing the staff and to individual staff members who were willing to take on the department' (Nieuwenhuis and Mokoena, 2005, p134).

### **Cost effectiveness**

Merging may not prove cost effective as 'amalgamations are very costly because of the trade-offs that are made to suit the people that are involved in each of the separate institutions. Often the over-riding concerns in the amalgamation or incorporation processes are (understandably) issues of job security. Issues of the programme for students are secondary' (Reddy, 2002, p17). This poses two problems. First, cost benefits are negated if two or more campuses are kept open to meet government requirements for minimum numbers of 2 000 students enrolled on a programme. This can mean little difference in staffing and enrolment on each programme, but can potentially increase bureaucracy as multi-campus programmes require increased communication. Reddy (2002) cites the example of the SACOL programme, a distance education INSET and pre-service teacher training institution that operates from two campuses, which 'means increased cost of maintaining the campuses, administrative functions and costs of communication between the two campuses. There is also a cost linked to loss of coordination and coherence in the programmes because they are split between two campuses' (Reddy, 2002, p17). The programme cost R18,000 a year compared to R15,000 for an Arts student undertaking university training, which is unacceptably high for a distance education course.

Furthermore, teacher education programmes are insufficiently funded. They are within the lowest subsidy funding category but have a high unit cost. Programmes (particularly the BEd) vary greatly in quality. In some cases BEd degrees have not prepared students with the requisite theoretical and practical knowledge to be effective practitioners (CHE, in print, in unpublished article). Barriers include restructuring amongst faculties and universities, causing instability, inadequate resources, and high PTRs, which affect the quality of programmes delivered at HEIs. High teaching loads mean staff have little time to dedicate to research, and this causes tensions as university expectations are not met (unpublished article). There is little incentive for universities to develop teacher training courses without financial support.

### **Summary**

By reconsidering the original objectives of restructuring of the national training system in South Africa, the conclusion is that impact has been limited. First, in terms of increasing and regulating supply, the number of overall teachers has risen, but has been offset by a sharp decline in IPET enrolments, and an increasing struggle to meet chronic demands for teachers qualified to teach the foundation stage and Grade R, in rural areas and in local languages. This may also affect recent government measures to ensure learners have

access to quality early childhood education. There are also indications that restructuring may partly explain the decline of young African women who enrol on teacher education programs, as HEIs located in urban areas increase the cost and other barriers for potential trainees. This links to the second aim, to improve professional training standards. An increasing number of trainee teachers are seeking cheaper alternatives to relocating to urban areas to attend programs in urban areas, which risks lowering the quality of education. Third, there is little evidence that restructuring has been cost-effective, or that funds are being used effectively at the institutional level. While there is little data to conclusively link restructuring reform with impact on teacher quality, the above findings, together with 1) tensions and disruptions in departments, 2) a continued lack of funding and support to HEI DoEs, 3) inadequate teaching and learning conditions on teacher training courses and 4) reports that graduates are inadequately prepared, suggests that a link between an increase in the quality of graduate teachers and restructuring would be somewhat surprising. This, in turn, will likely have an impact on South African teachers' ability to provide quality teaching and learning environments.

### **3.3.2. Policy 2: Redeployment, rationalisation and recruitment strategies**

From 1994 onwards, the DoE engaged in large-scale policy reform to redeploy teachers equitably and improve recruitment strategies. This section discusses two areas of reform: the redistribution and rationalisation process, and the role of SGBs in recruitment processes.

#### **Post-apartheid redeployment and rationalisation**

In the mid-nineties, teachers unions and government agencies worked together to find an agreement which 'would lead to an orderly rationalisation and redeployment of the teaching force based on the commitments that had been made, the needs of students, and the input of teacher organizations' (Chudnovsky, 1998). The aim of rationalisation was to equalise PTRs, and educational spending by reallocating teachers to historically disadvantaged provinces (Jansen and Taylor, 2003). The procedure was decided as follows:

- Ask for teachers to volunteer to relocate to disadvantaged areas;
- Conduct a national assessment of teacher distribution; and
- Restructure the process of teacher appointments to achieve an equitable PTR of between 35 and 40 throughout the country.

The South African Democratic Teachers' Union (SADTU) negotiated the process. The GoSA gave staff 'in excess' the option of taking a voluntary severance package or being redeployed to areas experiencing shortages (Soudien, 2001; Jansen and Taylor, 2003). Policies to 'weight' educator distribution in favour of poor schools were implemented, to overcome distribution skews that favoured schools offering more curriculum subjects (DoE, 2003). Despite misgivings amongst some SADTU members that buy-outs were self-destructive in a context with high teacher shortages and PTRs, the strategy was generally seen as positive for its potential to improve teachers' working conditions without forcing moves or creating redundancies. In addition, previously advantaged white schools were opposed to 'being restricted to hiring new teachers from the list deemed to be in excess at other schools regardless of those teachers' qualifications and experience' [...] in 1997, the Grove Primary School in the Western Cape, supported by 80 other schools, took the Minister of Education to court, arguing that the regulations were in conflict with the South African Schools Act of 1996, which empowered the governing bodies of public schools to appoint teachers of their own choice' (Jansen and Taylor, 2003, p31).

In 1998 a further redeployment policy to increase the number of teachers in rural areas was implemented. This was allowed under the Educator Employment Act (GoSA 1998):

*The Director-General or the Head of Department may transfer any educator in the service of the relevant department to any post or position in any other department of State with the prior approval of the person in that other department of State having the power to appoint or to transfer and with the consent of that educator.*

(GoSA, 1998, p10)

These policies had very little success, and almost a decade after initial redeployment strategies, the DoE restated the need to 'break the current pattern whereby more marginalised schools in rural areas suffering serious poverty are always the last choice of employment for educators, thus making quality education a more remote possibility in these schools' and that 'this can only be done by providing incentives' (DoE, 2003, p12). Specific measures to improve career progression, and recruit teachers in shortage subjects and rural areas have since been implemented (DoE, 2007a, 2008):

1. 1 600 teachers received funding on Math, Science and Technology ACE programmes;
2. 3 000 received funding on NPDE programmes;
3. A bursary programme (Fundza Lushaka) was made available which covered study and living expenses for 5, 000 trainees, who upon graduation must work for a PDE for the number of years for which they had received a bursary; and
4. Teachers were nominated in the national teaching awards.

### **Involving SGBs in the recruitment process**

The MoE recognised that it was necessary to devolve teacher recruitment and deployment to school level, stating in White Paper 2 that appointments would be made by PDEs, in consultation with SGBs. In attempts to give previously marginalised communities voice, elected parent representatives have been given the majority stake in making school appointments. Also on each board are the principal, teachers, non-teaching staff and (in secondary schools) learners. SGBs have the power to set admissions policies, recommend staff appointments and charge schools fees, subject to majority parental approval (OECD, 2008). SGBs can apply for additional powers, to purchase textbooks and resources, and decide on subject options and extra-curricular activities. While recommendations are made at school level, the provincial government retains the power to decline recruitment recommendations. In recognition that staff provisioning scales were 'austere', the MoE stated in its White Paper 2 that schools should have the freedom to use their own budgets to implement measures to improve the quality of educational provision, which permits the recruitment of contract teachers (OECD, 2008, p19).

### **Improved enrolments and equity?**

Initially, redeployment strategies were largely unsuccessful, causing many needed Maths and Science teachers to leave the profession (Garson, 1998). Few teachers chose to be redeployed; in the Western Cape 5 923 teachers opted for severance packages and only 1 200 were redeployed to disadvantaged areas (Soudien, 2001). By April 1997, over 19,000 teachers had applied for severance packages, almost 16,000 of which had been approved, at a cost of R1.05 billion (Jansen and Taylor, 2003). The most skilled teachers (and those more likely to gain alternative employment) formed the majority of those applying for severance packages, decreasing the pool of already sparse qualified educators (Jansen and Taylor, 2003). While the initiative was designed to improve teacher's working conditions, being redeployed to a less desirable area was not seen by the majority of educators as an

amelioration in circumstances. The number of applicants to teaching programmes decreased, as teachers feared being redeployed or moved (Samuel, 2002).

'In August 1997 the Cape Town High Court found in favor of the Grove Primary School', and SGB recruitment policy was relaxed, with stipulations made that schools could advertise where 'suitable' teachers did not feature on redeployment lists (Jansen and Taylor, 2003, p32). A few months later, redeployment policies were abolished, in favour of provinces deciding on numbers of teachers that would be recruited according to their budgets, and teachers distributed according to a 'post provisioning model factored in learner numbers, class size norms, teacher loads, whether more than one language of instruction is used in the school, and the number of pupils with disabilities (National Treasury 2003, p62; in Jansen and Taylor, 2003, p32). Empowering SGBs had a noticeable effect, as teachers recruited by SGBs accounted for over 6% of the total number of teachers employed in South Africa in 2006 (OECD, 2008).

In spite of the problematic and ultimately unsuccessful implementation of the policy in many ways, the intention was to make PTRs equitable across districts. South Africa has good PTRs compared to other countries in the region, as outlined in Table 3.8 below.

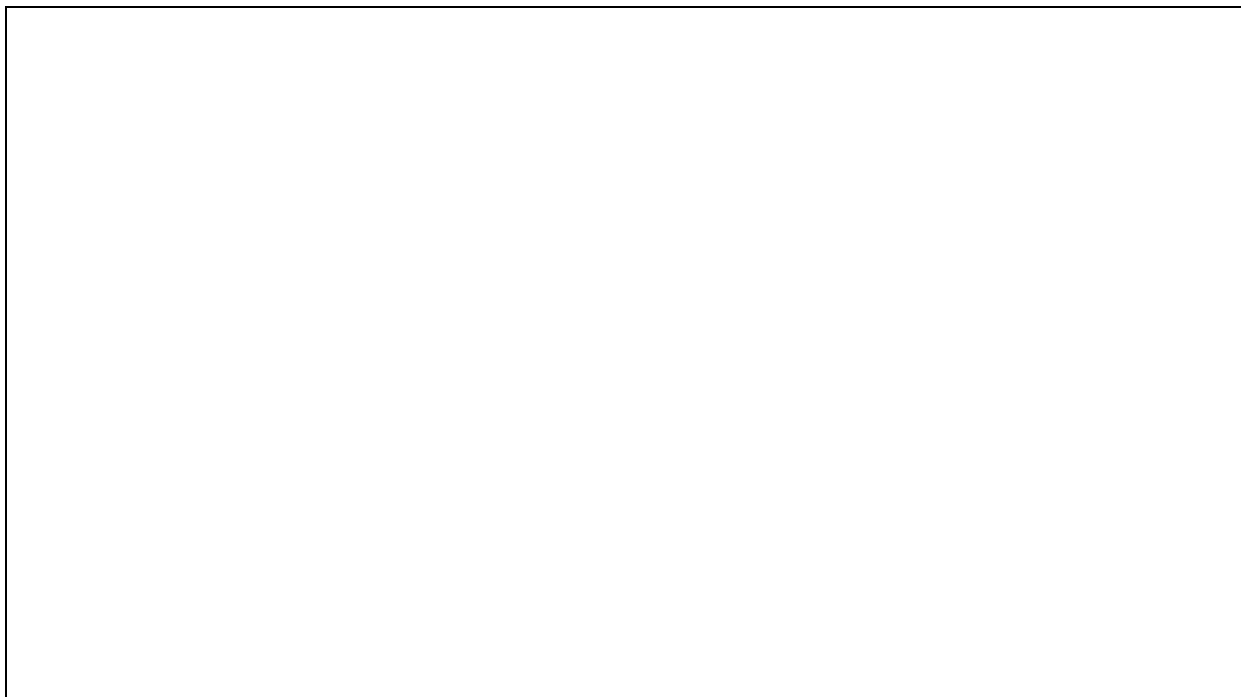
Table 27.8: Mean pupil-teacher ratio by country in SACMEQ II

Botswana	28.3
Kenya	33.4
Lesotho	53.9
Malawi	70.0
Mauritius	24.5
Mozambique	51.3
Namibia	31.5
Seychelles	16.6
South Africa	36.5
Swaziland	35.1
Tanzania	47.1
Uganda	58.0
Zambia	53.7
Zanzibar	35.0
Total	40.7

Source: Van der Berg and Louwe (2006)

The government has also been successful in reducing PTRs in previously disadvantaged schools. Table 9 gives an overview of PTRs by district:

Table 28.9: PTRs by district



Source: DoE (2008a, p37)

Table 3.9 reveals significant PTR equalisation between provinces. Nonetheless, historically disadvantaged schools and those in rural areas still have higher PTRs, partly as they have difficulty recruiting teachers, and partly because SGBs in affluent schools have the financial capacity to recruit additional teachers from their budgets.

Increased equity in PTRs cannot be attributed to the redeployment and rationalisation process. Between 1996 and 2000, the period for which the policy would have had the most impact, deviation in PTRs increased from 2.7 to 3.1, deviation in spending between provinces also increased (Jansen and Taylor, 2003). Improvements in access and GERs mask uneven student distribution, with previously white, Indian and Coloured schools having a greater enrolment of different racial groups compared to African schools, which remain 100% African (Soudien and Sayed, 2003). This is understandable, as there is little motivation for students to move to more disadvantaged schools. There has been a significant move of white students into the independent sector. This raises the question of whether previously exclusive schools becoming more racially diverse is truly indicative of greater equity in access to quality education, or whether it simply removes racial barriers for middle-class, financially able students. This highlights the difficulty of separating access and equity issues, as lines are often blurred.

Relating to access *and* equity, in certain instances SGBs have illegally refused students admission if they could not pay fees, or lacked documentation, with poor parents suffering most from discriminatory practices (Ministerial Review, 2004, in OECD, 2008). Inequalities between schools are public knowledge, with a parental guide describing the situation thus:

*The average teacher-to-pupil ratio in state schools is 1:33, as compared with 1:18 in private schools. At those state-aided schools where parents pay for extra*

*teachers by way of school fees, and at the more expensive private schools, the maximum number of pupils is usually about 30. At poorer schools this is often higher, with as many as 40 to 50 children in a classroom.*

*Given that most of the population is black, most state schools are still totally black and are therefore more culturally homogeneous than racially mixed schools. Other schools, usually in urban and suburban areas, are mixed in various ways. Some private schools are still mostly white, while others have an eclectic mix of hues and cultures. The government attempts to emphasise an anti-racist approach to teaching, and many schools tend to adopt a more multicultural approach, attempting to include the various cultures and religions.*

(SouthAfrica.info, 2010).

It seems difficult to overcome inequalities in a system where divisions between 'hues and cultures' are so entrenched. A further equity concern is that devolution of power has not led to inclusivity. There are indications that rather than integrating students in ways that recognise diversity, schools are allowing different racial groups to enrol, but encouraging students to convert to the existing 'white' school ethos (Carrim, 2003). Inclusion must extend beyond non-discriminatory policies and superficial assessments of access, enrolments, gender and racial parity to focus on giving voice to the historically disadvantaged. Otherwise the implicit message is that white systems were correct, preferred systems which will prevail, albeit that they are now available to all learners. This is evident in the choice to use English as the preferred language at previously white schools. The DoE deployment and distribution strategies, and SGB procedures, must consider how to make school systems more equal for all learners.

A key area of concern is the neglected link between HIV and AIDS, redeployment and rationalisation policies and historically disadvantaged provinces and schools. Deploying teachers to rural areas has been associated with higher HIV prevalence 'posting teachers away from their homes and families heightened the risk of transmission' (UIS, 2006, p25). This has the potential to increase the disproportionately high rates of HIV in poor rural provinces, such as KwaZulu-Natal, which has the highest rates in the country at 22% (UIS, 2006). This can, in turn, increase teacher attrition in the areas with the highest HIV rates and teacher shortages. Implementing a more effective and reliable system for gathering data on HIV incidence amongst certain groups, and provinces, and the impact on teacher attrition is necessary, as is making explicit provision for teacher attrition in areas expected to bear the brunt of the HIV and AIDS epidemic.

Creating racially diverse teaching staff is also difficult, an example being previously Indian schools where teachers have remained almost exclusively Indian, but students are now predominantly African (Sujee, 2004). Teachers are less mobile than students, as policies requiring racial equity in teacher employment, or for SGBs to reflect the school population, do not exist. SGBs have not overcome racial and socio-economic divisions: poorer schools struggle to sustain adequately functioning SGBs, and richer school SGBs are dominated by middle-class parents, with women under-represented and most representatives in previously white schools remaining white (OECD, 2008). Policies to make SGBs representative of the racial intake of students could help rectify these divides.

Differences in SGB functioning affect the quality of school governance provided. Additional responsibilities such as choosing options for which subjects are taught in school were initially



granted to previously white schools with the capacity to administer these functions effectively. This has gradually expanded to previously disadvantaged schools, but many poorer schools struggle to 'fulfil their basic functions' (OECD, 2008, p89). Challenges include skill gaps in comparison to richer schools, where parents have additional skills (such as finance and budgeting) that enable SGBs to run smoothly. Although the Schools Act requires that SGBs lacking capacity receive training, there have been arguments that in this way a 'technocratic' approach to school governance is promoted that is in conflict with 'the political nature of democratic involvement' and that the structure focuses on form, and fulfilling specific 'functions, rules and structures' rather than measuring the impact of SGBs on schools and their democratic functioning (OECD, 2008, p90).

This is supported by reports that, while 98% of school SGBs meet legal requirements, barriers to active participation in disadvantaged areas include low literacy levels of parents, direct and indirect costs (such as time), poor understanding of the roles, and lack of confidence in their ability to perform the roles (OECD, 2008). The democratic practices espoused in the new Constitution and backed up by education policy are countered by inequitable recruitment practices. Parents in poor schools, who lacked the skills to be involved in recruitment procedures, felt principals manipulated recruitment and favoured certain educators (DoE, 2004, in OECD, 2008). A study in the Western Cape, the Northern Cape and KwaZulu-Natal revealed that unions abuse their power in recruitment practices by appointing educators that the SGB and school management subscribe to (Mncube and Harber, 2010). Recent policy to regulate recruitment stipulates that SGBs have two months to recommend a teacher, after which the provincial head of department can decide without their input.

There are also tensions when management teams feel SGBs interfere in professional matters relating to education, and where there is poor differentiation between the role of SGBs and management (OECD, 2008). This may explain the finding that SGBs are mostly concerned with finance and budgeting rather than teaching and learning issues. Parents are also more likely to have expertise in finance and budgeting than in teaching and learning. Parental training on such issues could reverse this trend and strengthen the ability of SGBs to improve the quality of teaching and learning in schools (OECD, 2008).

A ministerial review has suggested the system should be redeveloped to increase efficiency, democratic practices and good governance. Despite these problems, SGBs are still considered progressive in increasing public participation and including marginalised and disadvantaged communities. Legislation introduced indicates that the DoE is disposed to learn and build on initial systems. One example is the Education Laws Amendment Act (2001), which requires DoEs to build SGB capacity, as well as having increased power to intervene if SGBs do not fulfil their duties (OECD, 2008). A second is the simplification of the recruitment of first-time teachers and those entering the profession in 2002, who only require consultation with SGBs rather than a recommendation and interview (OECD, 2008).

### **Summary**

The impact of the teacher rationalisation policy reform is debatable. On the one hand, it has led to a more equitable distribution system at national levels, and 'is likely to have given poor schools increased resources in the form of more teachers and relatively higher teacher to pupil ratios [although] it is not possible to be definitive about this in the absence of reliable data' (Taylor and Jansen, 2003, p2). This will certainly improve working conditions for the majority of teachers, and PTRs are definitely more equal than in the early 1990s, which is likely to have a positive impact on the quality of education. However, these achievements are offset by the recruitment of teachers by SGBs in schools with students of higher socio-

economic status (SES) which 'is likely to have diminished' the 'overall equity in the distribution of teachers' (Taylor and Jansen, p2). The devolution of power to school levels worked effectively, but only under certain conditions. SGBs and leadership teams at historically disadvantaged schools lacked the management and financial capacity to capitalise in terms of teacher recruitment. Those at previously advantaged schools have often abused their positions of power to retain historical advantages and exclusive systems.

The rationalisation process was poorly planned, as it was deployed concurrently with the implementation of C2005, and restructuring of teacher education institutions, which 'destabilised the profession' (Taylor and Jansen, 2003, p3). This concurrent implementation of policies also makes it difficult to attribute causal relations as to the impact of a specific policy.

Other indications that deployment policies are falling short of the mark is the inability to address dire teacher shortages in certain subject areas and provinces. In KwaZulu-Natal, 300 schools do not offer science or mathematics, subjects areas experiencing critical shortages, and South Africa continues to experience a wide inequity in distribution of qualified teachers between poor and wealthy students, and rural and urban areas (UIS, 2006).

#### **4.1.1. Policy 3: Outcomes Based Education-focused teacher curriculum policy**

This policy has *indirectly* impacted on initial teacher education and CPTD, which has been realigned with national expectations that teachers implement OBE through the NCS. The OBE curriculum was introduced with the objectives of improving the quality of teaching and learning and producing critical, analytical thinkers to compete in the 21<sup>st</sup> Century job market. Democratic principles and human rights are espoused and teaching shifts from teachers being central knowledge holders to teachers conducting activity-based lessons that start from the learners' knowledge base, to increase the relevance of learning. Modern teacher education programmes are expected to prepare teachers as lifelong learners, and model OBE techniques and theory that teachers are expected to implement in classrooms.

Merging teacher education colleges with HEIs has given teacher education departments increased authority and flexibility over the curriculum they implement. While this makes generalisation at institutional level difficult, the University of Durban-Westville (UDW) provides an example of factors affecting OBE curriculum reform (Samuel, 2002, p406):

- III. A model of teaching practice based on developing student teachers as critical reflective practitioners;
- IV. The changing ideology of the staff members drawing on literature from critical educational studies;
- V. The design imperatives of the SAQA registration process;
- VI. The national norms and standards for accreditation of teacher education curricula as per DoE regulation, including a refocusing on an outcomes-based approach to HE;
- VII. The changing school curriculum (C2005), introducing the shift in focus from subjects to integrated, interdisciplinary learning areas using an OBE approach;
- VIII. The need for university curriculum designers' recognition of the future employability of their graduates in learning sites other than formal schooling; and
- IX. The development of a curriculum for teacher education which provides articulation and mobility of students within the NQF.

While certain characteristics (NQF and SAQA requirements) remain constant, there is flexibility in 'the changing ideology of staff members' and 'future employability,' depending on staff priorities. This implies that a certain amount of control is given to teacher educators in

determining the curriculum and that the curriculum has largely been decentralised (Sayed, 2004). This reflects the GoSA's aim of promoting inclusive systems with participation from key stakeholders in order to produce quality teachers and raise learner attainment. However, this seems at odds with the design in certain universities, where student teachers only spend the last year of training in schools, as there would be a disconnect between theory and practice.

### **OBE impact on improving quality**

An overwhelming problem was a discrepancy between the curriculum the DoE wished to implement, which adhered to international educational theories on effective methods of education, and low human capacity to enact this change (Samuel, 2002). A case study of eight schools in Mpumalanga and Limpopo provinces revealed that educators required more training on the new curriculum (Bush *et al.*, 2010). One secondary school principal commented 'the new curriculum presents serious problems. It is demanding and some of us do not understand it.' One primary school principal stated that educators found the new curriculum 'very difficult to understand', while another had not introduced the curriculum (Bush *et al.*, 2010, p164). There are also indications that content knowledge was not made as explicit as needed, in spite of this being a focus of reform following C2005 'while the NCS for mathematics is clear about the progression standards to be achieved by the end of each grade, the language-assessment standards give teachers little guidance [...] teachers are exhorted to see that each pupil "reads lots of books (both fiction and non-fiction) and familiar rhymes at an appropriate language and reading level" (Department of Education 2001c). Yet it is not clear what is meant by appropriate levels of reading and language. [...] it is likely, as with C2005, that the pupils of teachers with poor knowledge resources (training, support materials) will lag behind as their teachers teach to the lowest common denominator, unaware of what is expected of them.' (Jansen and Taylor, 2003, p40). Lessons were 'at best uninspiring', with many teachers lacking the language and skills to implement engaging lessons. Principals had a 'weak grasp of teaching and learning, and lacked knowledge of the new curriculum' (Bush *et al.*, 2010, p164). This is worrying as it reveals that teachers lack the understanding and skills to implement the curriculum, certain schools are not implementing the new curriculum, and monitoring systems are inefficient as neither school management, nor provincial or national levels have succeeded in changing this state of affairs.

Confusion was exacerbated amongst teachers 'at the very point where they are still coming to grips with the original version of C2005 phased in at various grade levels since 1998. That is, before the cycle of curriculum reforms ran its course (through 2005), a revised version of the curriculum has already been introduced' (Jansen and Taylor, 2003, p). Teachers in schools where both C2005 and the NCS were in place at the same time were confused as to what they should be teaching and how. The DoE also lagged behind in providing for professional development needs. In some cases OBE teacher education had not taken place several years after the implementation of the curriculum, and in others it had taken the form of week-long 'crash courses' that inadequately prepared teachers for reforms (DoE, 2003). Many teachers retained values from apartheid, making differences between 'our' and 'their' schools (Soudien, 2000). When teachers were trained and whether they have experience of teaching during apartheid has a significant impact on their values, beliefs and experiences towards teaching and learning. Teacher training plays 'an important role in how teachers take in to account the different needs and cultures of the learners' (Nkomo and Vandeyar, 2008, p54). The DoE must take this into consideration in initial training and CPTD. If not, teachers will be unable to implement quality education that caters to the needs of all learners.

The impact of the NCS on teacher competency and quality education varies between provinces and/ or schools. Since NCS' implementation, many teachers continue to centre their lessons on DoE textbooks (Bantwini, 2010). This goes against principles of pupil-centred teaching methods and active learning. A study of how primary teachers at 88 schools in the Eastern Cape perceived the revised curriculum for Natural Science revealed that none had positive views, with all respondents either feeling negative or a neutral 'lack of concern'. Difficulties teachers reported included (Bantwini, 2010):

1. Increased workload due to additional paperwork and requirements to plan lessons. Teachers felt they did not have time for this with PTRs of between 50:1 and 80:1;
2. Difficulties with recruiting teachers, with classes often combined as the DoE took a long time to provide replacement teachers;
3. Teachers perceiving principals as benefiting financially from high enrolments without hiring more teachers, indicating a lack of trust in management. A question that arises is why SGBs were not making appointment recommendations and providing support;
4. Teachers and students being unfamiliar with teaching and learning methods. Teachers continued to use didactic techniques where learners copy and memorise information;
5. Lack of parental support;
6. Salaries perceived as too low for the amount of work; and
7. Teachers not understanding the difference between the NCS and the OBE curriculum, perceiving it as simply additional paperwork rather than as affecting teaching methods.

These difficulties meant that many teachers simply did not implement the NCS. One teacher reported that her school purchased a bank of lesson plans that were not used in class but were presented to the DoE during inspections. These conditions are not conducive to quality education, but rather show that teachers and schools see curriculum reforms as additional requirements to be met. This is understandable, as inadequate training means that teachers struggle to understand the curriculum or come to terms with the purpose of reforms. This may be because of the quick succession of the NCS after C2005, with some teachers feeling they understood one and not the other. The short nature of training was inadequate, and some teachers had not attended the session at all owing to a district union's dispute with the district office. The union recommended boycotting the NCS as a strategy to force the district office's hand. In reality, teachers were just handed curriculum documents afterwards and still expected to use them in class. District support and support networks between teachers were also inadequate. These factors no doubt contributed to the finding that 95% of teachers reported not using the NCS, and the remaining 5% being unable to give examples of practices they used that supported NCS implementation.

However, educators in a study conducted in the Western Cape, Northern Cape and KwaZulu-Natal reported feeling that changes since apartheid *had* been significant, and that the DoE had made efforts to reduce resource inequalities, ensure educators had the skills to teach, widen recruitment by giving power to SGBs, and democratise the system, which promoted higher quality education (Mncube and Harber, 2010). An educator in KwaZulu-Natal reported increased transparency, communication between educators, in-service training and opportunities such as distance learning, which supported the aim of having quality teachers in every school. Educators saw the NCS as proof that the GoSA recognised the discrepancy between educator skills and the OBE curriculum, and so had increased alternative methods of training (Mncube and Harber, 2010).

These positive views of DoE policy reforms indicate that certain teachers are aware of notions of quality education, equity and outcomes-based learning. Teachers reported actively using learner-centred methods in class, and stated that methods enhanced democratic classroom practice. Yet other educators believed 'democratic classrooms' based on OBE encouraged dissent and a lack of respect for educators. This may be because teachers lack training in implementing democratic practices in ways that encourage respect between students and teachers. Methods may be different from those students are used to, making them poorly equipped to deal with increases in power and decision-making authority (Mncube and Harber, 2010). The findings of this study differ significantly from Bantwini's, although educators also reported a lack of resources and training as barriers to effective curriculum implementation. The differences may be due to the three provinces in Mncube and Harber's (2010) study having higher percentages of quintile 1 and 2 schools, and therefore perhaps better-trained teachers, and fewer resourcing and PTR problems.

A study of teachers' intentions and actual use of interactive simulations during upper-secondary physics lessons demonstrated that teachers are most likely to implement strategies when they view them as useful, colleagues expect them to be used, and they are adept at using them (Kriek and Stols, 2010). This can be extended to most NCS strategies: teachers with PTRs of up to 80:1 who do not understand reforms and perceive reforms as nothing more than additional paperwork will be resistant to implementing the new curriculum. This suggests that certain quality indicators must be in place before learner-centred methods can be effectively implemented. A comparison of teacher perceptions in different quintile schools would be useful in ascertaining differences. Experiences across the country are very different according to the training received, involvement of the community and district offices, and resources available.

Initial preparation also seems inadequate, as PDEs criticise HEIs' preparation of Newly Qualified teachers (NQTs), who frequently lack literacy and numeracy skills and general content knowledge. One theory is that the focus on OBE has been at the expense of content knowledge and basic skills, which teachers cannot impart without a secure grasp themselves (DoE, 2005a). The new curriculum faces difficulties as it has many competing imperatives: to increase democratic and non-racial values, to produce learners that are critical thinkers and problem solvers, and to improve socio-economic indicators. There is a divide between input and output, as competencies such as 'critical thinking' are poorly conceptualised in terms of what they mean and how such skills can be taught. While the 'Norms and Standards for Educators' outline legal requirements for competencies teachers must have, the practical side of how this can be achieved is still lacking. Gokar (2010) uses the example of the requirement for teachers to be 'reflecting on how race, class, gender, language, geographical and other differences impact on learning, and making appropriate adaptations to teaching strategies' (Norms and Standards for Educators). How can schools monitor such competencies, and practices in class?

It also seems areas of knowledge that are crucial in the South African context remain neglected. Most teachers lack knowledge of the current and potential impact of HIV and AIDS on the teaching profession and education system, as well as the skills to address HIV and AIDS in schools and that 'as a matter of urgent priority IPET programmes need to equip future teachers with the emotional, social and practical competences to cope with the effects of the pandemic in learning sites' (DoE, 2005a). It is disconcerting given HIV incidence in South Africa, that 'there has been little attempt to mainstream HIV/AIDS in the education system, with the result that programs have remained marginal and stigmatized at the edges of the school curriculum' (Taylor and Jansen, 2003, p24). Jansen and Taylor (2003) argue that policy initiatives have yielded little impact, in part due to public debate 'stirred by leading

politicians, about the nature, extent, and even the causes of the disease. In addition, there is widespread denial about the causes of death of AIDS victims' (p11). In addition to inadequate EMIS systems preventing a lack of reliable information on HIV prevalence in the general population and also specific populations at risk, stigma leads to figures being misrepresented in communities. This meant that although there were policies in place, schools were unable to formally support vulnerable learners by providing them with food and clothing (Christie et al., 2007).

A further area that requires urgent development is attention to language of instruction policies (Christie et al., 2007). Currently, most students go through the education system in a language other than their first language, which puts them at a clear disadvantage. As previously discussed, teachers often lack the language to understand and transmit the curriculum. One possible way forward would be to train all teachers in second language strategies in all subjects (Christie et al., 2007). The lack of attention to language policies to support schools is aligned with a general trend to overestimate teacher and teacher trainee's competencies, and set the bar at a level which is too high for most educators to engage with. Reddy (2002) reported problems with a distance education SACOL programme delivering INSET and pre-service teacher training in 2000, which was designed to 'upgrade' teachers skills and knowledge, and therefore assumed previous experience of teaching. The times at which the SACOL institutions closed were inconvenient for students, meaning there was no support at certain times of year and there was no provision for teaching practice. In reality, most students had enrolled straight after high school and reported having learned more from the programme than qualified teachers. This alone is unlikely to give them the skills necessary to become efficient teachers and suggests that teaching quality following the programme is likely to be poor.

**Summary:**

The implementation of the OBE curriculum was accompanied by several misjudgments on the part of educational policy makers and planners in South Africa: the amount of time required for change, the need to take into account the different educational contexts, the type of training that would be successful and the complexity of transformation. What was lacking was 1) a systemic approach, with effective linkages and communication between national and local levels and 2) a strong evidence base on what kind of training and support systems lead to effective curriculum implementation and where. This meant that key stakeholders including the DoE, unions, district offices and school management ended up pulling in different directions instead of working towards the same goal. Accompanying this lack of coherence was insufficient resourcing, management skills and human capacity at district and school levels to initiate effective change. What resulted, therefore, was a disparate impact where, in the best cases, teachers saw the reason for reform and effected change in teaching and learning in schools, which increased the quality of education in their classrooms. In most cases, however, it led to confusion, superficial implementation and further disenchantment with post-apartheid policy reforms, which teachers perceived as adding to their already heavy workload with little purpose. The NCS has the potential to raise the quality of education, but workable PTRs, sufficient resources and efficient training systems are a prerequisite to success.

#### 4.1.2. Policy 4: Mainstreaming qualifications, upgrading skills and implementing effective CPTD

##### Mainstreaming teacher qualifications

Increasing the quality of teaching and learning by mainstreaming the qualifications framework was a key component of reform. This is important in the South African context owing to 1) the skewed training system during apartheid, which left many teachers lacking in the basic skills and knowledge for implementing quality teaching strategies (particularly in African schools); 2) requirements in the NQF framework and 'Norms and Standards for Educators'; and 3) for improving monitoring and evaluation systems. South Africa is one of few sub-Saharan African countries to require teachers to complete tertiary-level education (as well as Namibia and Zimbabwe; UIS, 2006).

##### Upgrading teachers' skills

Upgrading qualifications was important owing to the high numbers of un- or under-qualified teachers in the apartheid system, predominantly in poorer African schools. Upgrading has often taken the form of in-service teacher education distance programmes, such as the ACE. Upgrading policies have been successful; in 1994, 122 459 (36%) of educators were un- or under-qualified compared to 76 839 (22%) in 2000 and just 8.3% in 2004 (OECD, 2008). Nonetheless, these figures must be treated carefully as the 'Norms and Standards for Educators' recommends that the benchmark for a 'qualified teacher' should be M+4, whereas SACE minimum standards are M+3. In 2005, EMIS data showed that 11% of teachers were below M+3, 39% were at M+3 (and considered 'qualified'), and only 50% were at the recommended minimum qualification level of M+4 or above (DoE, 2005a). The reduced percentages of un- and under-qualified teachers may mask inadequate training in OBE and the new curriculum (DoE, 2005a). In addition, certain reports are contradictory, such as SACMEQ data revealing that South Africa has just over 30% of teachers with only primary level education, and 26% with tertiary level education (Bonnet, 2007). Inequalities in the distribution of un- or under-qualified educators are apparent, as outlined in Table 3.10 below.

Table 29.10: Percentage of un- and under-qualified teachers

Primary schools	Secondary schools	Rural schools	Urban schools	Coloured educators	White educators	Provinces with over 10% un- or under-qualified teachers
11	2.8	9	7.5	13.8	2.2	North-West, Free State, Northern Cape and Western Cape

Source: Department of Education (2005f, p47 in OECD, 2008)

It is interesting to note that three of the four provinces with the highest proportion of un- and under-qualified teachers also have higher-than-average percentages of schools in the lowest quintile. This is not the case for the Western Cape, which has the highest percentage of schools in the top two quintiles. Further investigation into why the richest province in the country has such a high number of un- and under-qualified teachers<sup>36</sup> may yield interesting findings.

##### Effective CPTD

CPTD links closely to skill upgrading, and is consistent with the push for the DoE to facilitate teachers as lifelong learners within the OBE framework. The DoE considers CPTD important in supporting teachers in dealing with radical changes in the curriculum, teaching methods

<sup>36</sup> See Appendix 6.2 for an outline of provinces and percentages of schools in each quintile.

and diversity of learners since apartheid. It is also considered important to modernise the conception of CPTD from the previous idea of gaining additional academic qualifications linked to pay increases to the current idea of processes that improve the quality of teaching and learning and link to policy reforms. In South Africa in the three years preceding the study, almost two thirds of teachers had participated in CPD, high for the sub-Saharan region (UIS, 2006). However, this is still low considering that teachers are expected to gain a certain amount of PD points over a three year cycle. In the past, CPTD had little impact on teaching, and has thus become a key area of policy reform. The new CPTD system pledges to link professional development initiatives more effectively to the quality of teaching and learning.

### **Have better qualified teachers and reformed CPTD led to greater quality?**

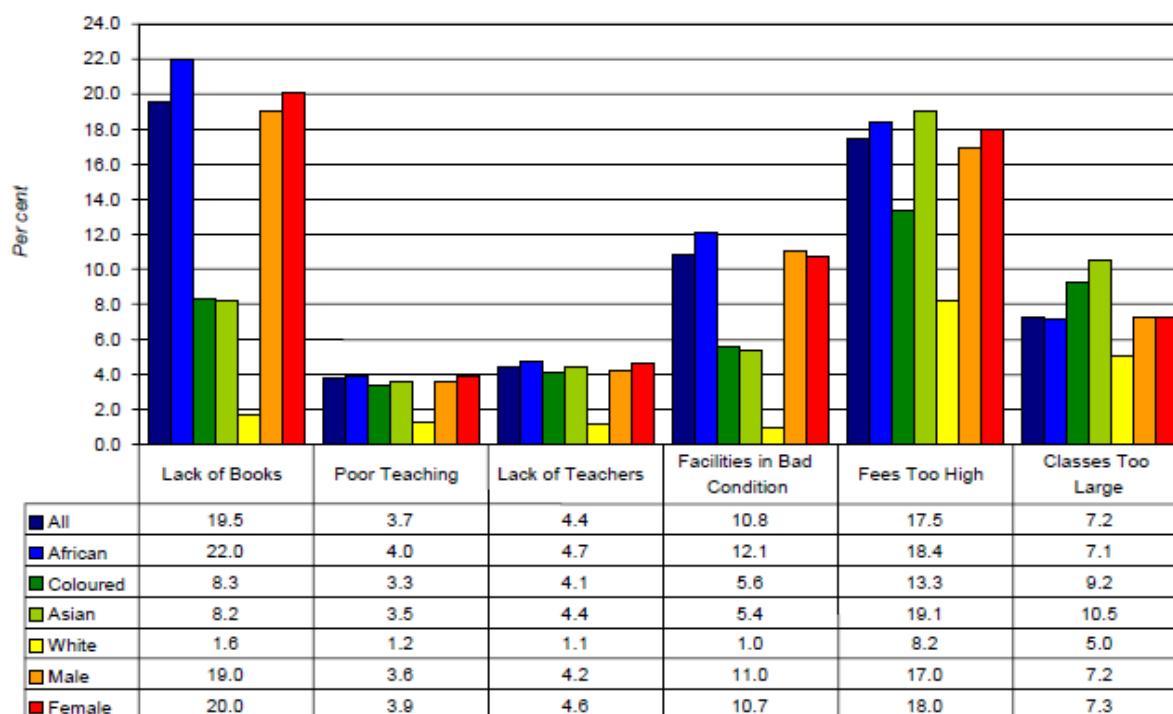
Certain universities have used innovative distance education programmes to upgrade teacher qualifications. The Eastern Cape had over 130 000 under-qualified primary and secondary teachers in 1995. The University of Fort Hare, in collaboration with provincial government, delivered courses founded on practical, OBE-focused activities for teachers to use in class. Assessment was based on success in designated activities on an ongoing basis rather than on summative examinations. Provincial government staff provided tutorial support within schools. This led to teachers completing a diploma in a period of two to three years (ILO/ UNESCO, 2006). Such programmes have value internationally, in their ability to focus on desired areas of teaching and learning, their ability to reach a large number of educators (while keeping them in schools and reducing the need for cover teachers), their comparatively low cost, and their increase in numbers of qualified, quality teachers.

CPTD policy is trying to redress findings from the 1995 teacher audit that many teachers were achieving additional qualifications (often resulting in higher salaries) with little impact on teaching practice. Lessing and de Witt (2007) evaluated a CPTD programme in Gauteng province and found that the Gauteng DoE lacked the capacity to implement training programmes on the required scale, and had enlisted teacher training institutions to help deliver these programmes. This evaluation took place at the University of Pretoria, which delivered the programme, and aimed to upgrade OBE knowledge and skills. Teachers were dissatisfied with the programme, as their expectations of feeling equipped to provide quality education for the diverse learners in their classes were not met. They were also unhappy at the training taking place over six Saturdays, as they did not feel it was worth the personal time they had forfeited.

Entrenched disadvantages experienced during apartheid continue, as do inequalities between universities. This is in spite of historically advantaged universities being those that most often receive accreditation for teacher training. This suggests that institutions are engaging with policies differently, from real change taking place to superficial, procedural changes that focus on form above deeper aspects that affect the quality of teaching and learning. Guidelines must be clear, with effective monitoring systems in place to maximise efficiency and ensure minimum levels of quality. For example, the 'Norms and Standards' provides insufficient guidelines on what ACE programmes should specialise in; when the ACE was reviewed in 2006-2008, there were 69 different ACE programmes throughout the country and over 290 specialisations (CHE, in unpublished article). This goes against reforms that have tried to simplify the teacher training system and make it more equitable. For example, South Africa performs well on certain quality indicators, such as PTRs. However, PTRs that look impressive on paper have not translated into quality outcomes. Three countries with higher PTRs (Mozambique, Tanzania and Uganda) outperform South Africa in Mathematics scores.



Figure 6.3: Problems experienced at school by 7- to 18-year-olds, 2003



Source: GHS (2003, in DoE, 2006, p41)

Figure 3.3 highlights two important points. The first is that problems experienced are high for all students. Particularly worrying is that almost a fifth of students lack textbooks and find fees too high. The second is an obvious racial inequality, with African, Coloured and Asian students having significantly higher instances of problems compared with white students. African students are almost four times as likely to experience poor teaching and five times as likely to lack teachers as white students. It is dissatisfactory that policy reform, qualification upgrading and curriculum reforms have not translated into improved quality of teaching and learning for all groups.

Persistent inequalities in achievement between poor and rich areas affect 'the secondary phase, HE results, and ultimately people's access to the labour market and the possibility for the marginalised to break out of the cycle of reproduction of poverty and disadvantage' (The Presidency, 2008, p24). Reversing this trend requires 'improving quality and efficiency at all levels' (The Presidency, 2008, p24). South Africa performs poorly in comparison to developed countries that spend less on education (van der Berg and Louw, 2006) and in contrast to 'less well-resourced neighbours' in international studies<sup>37</sup> of Maths, Science and literacy achievement in (The Presidency, 2008). The range of scores is far above average, revealing higher inequalities in South Africa than in other countries. Although the number of learners passing the secondary school leavers' exam has increased, the percentage pass rate remained the same between 2005 and 2008 (DoE, 2008). In 2003, the DoE recognised that compared to other countries (even those with lower educational expenditure), South Africa's return to investment in terms of learner performance was low, with one of the main reasons considered 'low teacher productivity' (DoE, 2003; OECD, 2008). The DoE

<sup>37</sup> These are the Monitoring Learning Achievement (MLA) Project, the Trends in International Mathematics and Science Study (TIMSS), the Southern Africa Consortium for Monitoring Educational Quality (SACMEQ) study and the Progress in International Reading Literacy Study (PIRLS).

considered 'reskilling our educators to provide quality schooling' to be a 'mammoth task, which depends not only on Government programmes, but also on initiatives from the school level' (DoE, 2003, p10). Qualification upgrading policies and curriculum revisions have therefore yet to have a perceptible impact on achievement.

Racial equity in educational attainment has improved, as demonstrated in Table 3.11.

Table 30.11: Mean educational attainment of 16- to 20-year-olds by race and parent educational level

Data set	Race group	Average Parent Education Category					Total
		0 yr No Schooling	1-6 yrs Incomplete Primary	7-11 yrs Incomplete Secondary	12 yrs Complete Secondary	>= 13 yrs Tertiary Qualifications	
Census 1985	Black	4.94	6.86	8.36	7.84	7.19	6.65
	Coloured	5.49	7.10	8.93	9.09	8.50	7.72
	Indian	9.61	10.07	10.74	11.40	11.57	10.44
	White	9.75	10.16	10.81	11.26	11.43	11.00
	All	5.20	7.16	9.28	10.45	10.55	7.79
Census 2001	Black	7.56	8.86	9.83	10.40	10.81	8.87
	Coloured	7.23	8.74	10.17	10.93	11.43	9.73
	Indian	9.54	10.71	11.32	11.49	11.86	11.30
	White	8.39	10.24	10.72	11.21	11.49	11.13
	All	7.56	8.87	10.04	10.82	11.23	9.23

Source: Van der Berg and Louw 2006)

Equity in attainment increased significantly between 1985 and 2001, with particularly noticeable improvements for Coloured and Black groups.

### Summary:

Innovative, flexible systems have been implemented to ensure opportunities for teachers to upgrade qualifications, and CPD systems have greatly improved, and are reaching a significant proportion of the teaching force. Nonetheless, this needs to be expanded to all teachers to have meaning in terms of lifelong learning, and to link clearly to SACE regulations and government policy on minimum professional development requirements. As with the new curriculum implementation, there needs to be a greater focus on the application and relevance of CPTD programs to teachers, as they currently leave many teachers feeling dissatisfied and resentful of any personal investments they have made to attend (such as time). Inadequate planning and a lack of coherent vision for the educational system as a whole, and how policies will interact means reforms become counter productive – such as ACE programs which multiplied rapidly to go against government efforts to simplify the system. Proxy measures of quality, such as learner attainment, also suggests that CPTD has yet to have a significant impact on raising the quality of teaching and learning in most schools.

#### 4.1.3. Policy 5: Strengthening monitoring mechanisms through the Integrated Quality Management System (IQMS)

Post-apartheid reforms aimed to increase the quality of teaching and strengthen monitoring mechanisms, all the while involving key stakeholders (teachers) in the decision-making process. This led to the IQMS being developed in 1994. The GoSA allocated R87 million to IQMS between 2007 and 2009 (OECD, 2008). The system links teacher development to

salary progression scales, whereby teachers assess their levels of competence and development as part of whole school appraisal systems. Internal school committees evaluate teachers as 'good' (salary increases by two points every three years), satisfactory (one salary point) or unsatisfactory (no advance; OECD, 2008). The National Education Evaluation Development Unit (NEEDU) was also established, to monitor the measurement and development of educator competence (OECD, 2008).

### **Impact of the IQMS**

Policy has struggled to maintain the dual remits of assessing teacher performance and involving teachers in the process. Biputh and Mckenna (2010) posit that this is because competing discourses make implementation difficult. The GoSA is attempting to implement a system of teacher appraisal within a 'development' framework with the educator at its centre. To support reflective practice, teachers evaluate their strengths and weaknesses, which form the basis for skill development. This is intended as a move away from top-down, performance-based apartheid systems, and trials have received very positive feedback from schools and educators. However, when implemented, the IQMS has been embedded within an 'accountability' framework in which teacher performance is one component of whole school evaluation. Performance is linked to pay increases, and teachers have admitted not reporting weaknesses that could negatively impact on salary, without leading to development opportunities.

While 'accountability' and 'development' frameworks are complementary, teachers' attitudes towards any appraisal system reminiscent of apartheid are extremely negative (Biputh and Mckenna, 2010).

*The accountability system is weak because of a pervasive culture of resistance to strong measures of accountability within schools. The deep negativity towards the apartheid inspection system should not be ignored in the way government crafts a new and comprehensive system of accountability touching all schools. [There is] resistance among organized teachers to classroom visits and observation by officials from the provincial departments of education.*

(DoE, 2009a, p44)

Teacher resistance to performance assessment is evident; out of 14 countries that participated in a Southern Africa Consortium for Monitoring Educational Quality (SACMEQ) programme, only South African and Mauritian teachers refused to participate in the element testing teacher knowledge (Taylor *et al.*, 2008; UIS, 2006). One study of the Khanyisa programme in Limpopo (Taylor and Moyana, 2005, in Taylor *et al.*, 2008) to assess literacy and Mathematics knowledge amongst Grade 3 teachers (designed using items from tests to assess Grade 6 students) revealed the average score on the Maths test for 25 teachers to be 67%; only one teacher scored 100% correct and three scored below 50%. The average score on the Language test for 23 teachers was 55%. This is especially worrying as assessments are based on knowledge expected in the primary grades, and leads to question the effectiveness of teacher qualification and CPTD programs which let teachers with such low basic skills pass through the net.

The success of the IQMS policy 'requires educators to engage in its underpinning purpose', that is to 'advocate accountability' and 'to ensure that there is ongoing support and improvement' (ELRC 2003, in Biputh and McKenna, 2010, p286). In practice educators were resistant to the IQMS, which they viewed as 'a bureaucratic, paper exercise rather than a reflective and developmental process and [...] something with which they had to comply at a surface level' (Biputh and McKenna, 2010, p286). Therefore the hindrances to successful implementation, that is a lack of resources and educators perceiving the system as a state

regulation they had to comply with, are similar to those encountered in curriculum reform. The Minister of Education perceived 'unmonitored peer review systems' to be conducive to teachers agreeing on high evaluation scores rather than reflecting actual strengths and areas for development (Biputh and McKenna, 2010, p288). This view was corroborated by teacher reports, which indicated that peer review was used superficially to meet requirements. Surprisingly, considering these shortcomings, teachers reported being more reflective practitioners as a result of the IQMS.

What also seems to be the case is that professional development and evaluation that would support the IQMS system are skewed towards classroom reflection and control; teacher skills are not sufficiently exploited outside the classroom. A study of 1 055 teachers in KwaZulu-Natal showed that teachers were mostly reflective practitioners who took the initiative to update learning and techniques in class (Grant *et al.*, 2010). However, less than a fifth of these teachers often gave inset trainings to colleagues, and less than a third did this sometimes. Of particular note in relation to IQMS is that only 38.4% of teachers 'often or always participated in the performance evaluation of their colleagues', although this is a key IQMS requirement (Grant *et al.*, 2010, p412). This indicates weak monitoring at the level of management; that teachers are not given the freedom to be leaders outside of the classroom environment (which is contrary to the participatory practice encouraged); and that key IQMS components are not being implemented in schools. Simplifying the existing system, together with stronger training to management and teachers and better monitoring systems, may help overcome these shortcomings.

A single IQMS system is inadequate, as 'the complexity of using one single IQMS instrument for three fundamentally different processes, that is Developmental Appraisal, Performance Measurement and Whole School Evaluation, has created tensions in schools as each of these programs has a distinct purpose' (Biputh and McKenna, 2010, p289). The tensions between these approaches undermine the developmental aspects of the IQMS and the accountability aspects of the system are subverted through a compliance approach to system implementation. The authors suggest reforming the system to separate performance evaluation and development components. This would allow teachers to engage more deeply with the development component as pay-related stakes would be removed. Additionally, more objective quality assurance could take place in schools, to address persistent shortcomings (Biputh and McKenna, 2010). Amongst the plethora of problems experienced in schools are teacher absenteeism, inefficient use of time in class, and ineffective teaching methods and planning skills. 'Weaknesses specific to key agents in the sector, that is teachers, may be the significant factor contributing to poor quality' (Taylor *et al.*, 2008, p50). While this may be true, it is unacceptable that this is still the case after budget allocations, policy reforms and programme implementations since 1994.

The DoE (2007b) has stated (p142) that the teacher performance system through the IQMS will be enhanced by:

- Working with PDEs to ensure that all schools develop effective plans and schedules and undertake meaningful assessments and teacher development plans;
- Providing district managers with the tools to conduct stringent moderation of the school-based assessments;
- Appointing part-time moderators to evaluate the implementation and outcomes of the 2007 assessment processes; and
- Developing a framework for a national education and evaluation unit.

While these measures may have a positive impact on learning and teaching, this seems another reactive strategy rather than an indication of effective planning. What would make

more sense would be to implement policies in ways that have been successful during trials and to incorporate teachers' views within a clearly formulated policy framework, supported by effective training that makes explicit the benefits to learners and the teaching profession.

A recent evaluation by the ministerial committee reported 14 main findings and recommendations regarding the establishment of NEEDU, notably that there was (DoE, 2009a, p):

1. *broad recognition of the crisis in education and the limitations of existing evaluation instruments to, in themselves, remedy the situation:* Monitoring and evaluation systems have not improved systemic educational performance, which is evident in the failure to raise learner achievement.
2. *widespread consensus on the need for stronger accountability measures alongside developmental support to be introduced into the school system:* This is resistance in schools to 'strong measures of accountability'. This was compounded by incompetence and lack of support at district levels. The system of accountability should be expanded beyond terminal examinations, to incorporate information such as teacher assessment.
3. *reluctance in some quarters to change existing monitoring and evaluation initiatives not only because of the potential disruption but also because recent measures (such as IQMS) have not yet had enough time for expression in educational practice:* Teachers feel 'reform fatigue' and apathetic towards new policies implemented. To introduce a new system of monitoring and evaluation before the IQMS is due to finish, is not recommended.
4. *considerable variation in the capacity of provinces and schools for the interpretation and implementation of evaluation and development measures:* The system should be reformed to take account of district and school capacity, and makes expectations realistic. This should be supported by training from well-qualified professionals for school management teams and districts.
5. *that authority and expertise at all levels (teacher, **HOD**, principal, school, district, province, national) remain important requirements for effective implementation of monitoring and evaluation:* Experts supporting schools and district offices should be given the authority necessary to make their position meaningful, to conduct observations, evaluations and enforce consequences where standards are inadequate.
6. *that deeper and more fundamental problems (e.g. curriculum organization, time on task, school dysfunctionality) undermine sophisticated efforts to monitor and evaluate school and teacher performance:* External and internal factors having a negative effect on monitoring and evaluation should be addressed (ensuring strong leadership, and curriculum effectiveness be reviewed).
7. *that the system for evaluating teachers and schools is still considerably immature, with the incapacity for self-scrutiny among many (though certainly not all) professionals:* While it is a democratic, participatory process that should not be completely discontinued, the internal evaluation system needs review as it is subjective, and unreliable. Varying capacity at district and school level makes the system inadequately prepared to undertake objective evaluations.
8. *the issue of excessive complexity in existing evaluation instruments is still not resolved inside the crowded ecology of evaluation, appraisal and development policies, plans and processes:* The system must be streamlined and made simpler, more relevant and meaningful.
9. *the existing system for evaluation and appraisal faces a growing credibility crisis because of the functional breakdown between school/teacher evaluation and developmental follow through actions to effectively address problems identified:*

Teachers were open to evaluation, but monitoring often lacked subsequent learning opportunities or follow-up. This increased the feeling that monitoring and evaluation lacks relevance. A systemic approach is needed, with responsibilities and expectations at teacher, school, district and national levels well delineated and accountability systems in place to ensure that these are carried out.

10. *that the co-mingling of developmentally-focused evaluation and remuneration-focused appraisal compromises the validity of measures of school or teacher performance:* Linking evaluation to salary scales compromises the objectivity of reports. The system should instead focus on how evaluation and monitoring benefits teaching and learning.
11. *that in practice the evaluation instruments do not monitor the impact of policy on teaching and learning; they monitor policy compliance*
12. *that the failure to separate curriculum support and advisory roles from curriculum monitoring roles constrains the credibility of both:* Although teachers received little support during visits, monitoring officers criticised curriculum implementation when carrying out evaluations. This strengthens the need for district level monitoring to ensure that both support and improvement roles are being carried out, as well as evaluations, and both are done effectively.
13. *that there is an unspoken complicity between school and district that compromises the monitoring of IQMS educator performance*
14. *that leadership is critical at provincial and school level to make the best out of the complexity of evaluation and development efforts and instruments*

### **Summary:**

What emerges clearly is a lack of trust between teachers and the MoE, or anyone involved in monitoring. Teachers superficially comply with IQMS requirements, but do not report their strengths or weaknesses accurately, fearing negative consequences in terms of salaries. The MoE is suspicious of reports, and both parties are dissatisfied with current arrangements. A serious concern is how cynical teachers are becoming towards reform. This should be a serious consideration for the DoE. More problematic is that this makes teacher evaluation and development largely meaningless, as it is founded on subjective reports aimed at retaining salary increases rather than focused on teaching and learning. This could be overcome by separating the developmental and performance aspects of the IQMS and with better training for managers, who can then fully exploit staff skills within schools. Systemic efficiency must be increased at the level of teachers, but also managers and district officers, so that an effective system be in place to support schools level efficiently. The IQMS has had a very limited impact in its current form, but with effective training, an increase in authority of monitoring and evaluation officers, financial support and careful consideration of using current capacity as a starting point (and perhaps differentiating or providing a phased-in system for those with lower capacity) still has the potential to provide a strong framework for school improvement.

## **3.4. Conclusion**

### **3.4.1. Analytical summary: main findings**

Given the legacy of apartheid, and embedded inequalities inherent in the educational system, the GoSA has made significant steps in putting in place a framework to support democratic and equitable educational practices. This has been supported by a clear vision of what the government hopes to achieve: an equitable distribution of quality educators who raise the quality of teaching and learning, equalise PTRs, improve learner attainment and prepare new generations of South Africans to be competitive in the global job market. Reform has been accompanied by a comprehensive policy overhaul and efforts to translate rhetoric into

practical results. As has been mentioned throughout the study, the multitude of education policy reforms occurring simultaneously make it difficult to attribute impact to teacher education policy specifically, and even more difficult to make causal links between a specific policy and change. Nonetheless, this section briefly provides an overview impact in relation to each policy in terms of enrolments, quality and equity in education.

#### A. Restructuring the national training system

The number of teachers has risen, which is likely to have had a positive impact on the number of teachers available for recruitment, and contributed to lower PTRs, increased access and better quality education. However, benefits in quality may also be negated as many students find the high cost of attending HEIs in urban areas prohibitive, and seek shorter, cheaper alternatives (of variable quality) to face to face IPET programmes. In terms of access, the South African teacher education system is not producing sufficient numbers of graduate teachers to cater for the foundation stage or Grade R, or alleviate the need for teachers in shortage subjects such as science and maths. Therefore its affect on access seems limited, with a further impact on equity as shortages are chronically severe in the poorest, most marginalised areas. Restructuring is also associated with fewer young African women enrolling in teacher education courses, which means a smaller pool of local trainees who are able to communicate in children's local language of instruction, to the further detriment of providing equitable schooling options for all learners. Therefore overall impact seems limited to an increase in the number of teachers, without positive outcomes on equity or quality.

#### B. Redeployment and recruitment policies to increase the number of teachers in disadvantaged areas

It is difficult to draw conclusions regarding the impact of teacher redeployment and recruitment policies, as the results are contradictory and decisive data is lacking. Hence Taylor and Jansen's (2003, p2) tentative conclusion that it 'is likely to have' increased teacher numbers and equalised PTRs, and lead to an increase in the quality of education for many pupils. On the other hand, devolving power to SGBs has been a barrier to providing equitable opportunities to inclusive education for most learners. Previously advantaged schools had the budget and capacity to use this power to maintain low PTRs, ensure that pupils had the opportunity to study options they felt were important and generally improve the quality of teaching and learning within schools (or at least maintain the previously high standards as school fees more than compensate for lower government subsidies). In most schools, capacity and financial resources were lacking to maximise SGB policies, which is a serious threat to equity. The GoSA must consider how to create equity in the education system that goes beyond equitable opportunities for all middle-class learners and extends to those with the highest need.

#### C. OBE-focused curriculum

The OBE curriculum has had limited impact in relation to its aim to increase the quality of education. Large-scale studies of learner achievement and classroom observations have clearly shown little improvement. This also means that indirect impact on access and equity (as learners are less likely to drop out, as education is more relevant) will also be limited. As with the previous policies, a key problem is that the schools that were already in a position of comparative advantage in terms of having a high proportion of qualified teachers, good resources, strong management teams and financial capacity were able to implement policy more effectively. Once again, equity remains a key concern. Another problem is that the GoSA's financial investments are resulting in inadequate outputs – increased CPTD opportunities and training programmes for teachers have yielded disappointing results which in many cases seem to have added to policy fatigue and cynicism regarding reforms.

#### D. Mainstreaming qualifications, upgrading skills and implementing effective CPTD systems

The impact of upgrading policies has been an increase in attention to CPTD and minimum qualification levels that has led to South Africa being one of the countries in sub-Saharan Africa with the highest teacher participation in CPTD programs. Therefore at minimum, a framework which ensures access to CPTD opportunities is in place. However, the impact of CPTD programs is disappointing, and often leads to teachers feeling frustrated that their concerns and needs remain unaddressed. Now the GoSA must focus on how to move beyond superficial teacher compliance to the impact being felt in terms of increased learner attainment and higher quality education. This can be achieved by taking a systemic approach, which clearly links SACE and government requirements within a cohesive framework.

#### E. The IQMS

The IQMS has had little impact on the quality of teaching and learning, as it has failed to move beyond teachers and evaluators superficially abiding to obligations. Currently, there is a persistent culture of suspicion, blame, mistrust and skin-deep deference to policy requirements. Again, a systemic approach, including stakeholders at national, regional and local levels is necessary to move forward in a way which unites educational professionals towards a common goal: improving teaching and learning.

While this may seem depressing at first glance, and there is still considerable progress to be made to achieve an equitable education system, there has been undeniable success in many areas. South Africa's 'ground zero' following apartheid was a system with restricted access, low learner achievements, and racial and economic divides entrenched at all levels of the system. In comparison, South Africa has managed to achieve near-universal access to basic education and gender parity, equalise PTRs, and increase access at secondary and tertiary levels. Working conditions for teachers have greatly improved, with higher access to teacher education programmes, and an increase in democracy through stakeholder participation.

The quality of education remains a concern, as certain policies have been successful, but this has mostly been where the human, financial and resource capacities were already sufficient to enact change. Widespread inequalities remain, in particular with supply and demand issues in poorer and rural areas that affect educational access. Therefore, while SA 'looks good on paper', equity and quality indicators reveal there is a long way to go. Inputs have resulted in disappointing outputs, and learner attainment in South Africa is inadequate. This is a concern, as improvements in literacy and numeracy skills at the primary level are necessary to increasing equity and quality at higher levels of education. What is needed is equalisation of management capacity between districts and institutions, commensurate with the quality of teachers. Persistent advantages in certain areas mean that SGBs have the power and financial resources to supplement government provisions in terms of human and physical resources, in spite of pro-poor funding systems. Nonetheless, given the context from which South Africa has emerged, the chasm between policy and practice is not surprising.

After the tumultuous changes experienced over the last 16 years, the focus must now be on consolidating policy by focusing on practice, and addressing issues of identity, race and equity that are persistently deviating from policy frameworks and legislation and remain a barrier to quality education. Government policy seems to have focused on the what (creating an education system that supports a more equitable society, principles of democracy and



prepares South African learners for the 21<sup>st</sup> Century job market), and the why (to redress apartheid practices and be internationally competitive) but with a shallow notion of how the 'what and why' can be achieved. Reform has yet to go beyond policy frameworks, increased spending and short-term programmes. In South Africa the pre-existing conditions and capacity in different school districts (and within them) and how objectives might be practically implemented have been neglected. Teacher education systems have struggled to cope with change, and at school and HEI levels there is resistance to many reforms.

While teacher policies are created at national levels, the context affects how they are implemented and modified by individual schools. Change must now go beyond expanded opportunities for the Indian, Coloured and African middle class to true equity and quality in education. An underlying problem is the tension between competing agendas and principles. The teacher education system has not caught up with the gamut of ambitious policy reforms initiated since the mid-nineties. Reform remains ineffective as the DoE is giving teachers, as educational stakeholders, voice. There is inadequate communication from local to national levels and vice versa. Teachers are feeding up inaccurate information in response to perceptions that the DoE is making unrealistic demands or trying to monitor them in unsupportive ways. Energies are wasted as teachers, schools, governing bodies and national and provincial DoEs pull in different directions rather than work towards a shared vision of effective teaching and learning that will continue to transform the education system and wider society.

### **3.4.2. Policy lessons and recommendations**

#### **South Africa**

Despite the progress made, the lack of learning at national levels that informs subsequent policy formulation and implementation is worrying. Soudien (2007) argues that policy reform has failed to take into account existing failures, focused too much on form and has not overcome the apartheid legacy. Many reforms have failed to yield expected improvements, and have needed substantial modification after their initial implementation. This is clear in the example of C2005, which had to be streamlined and re-issued (and still lacks a significant impact), or the plans to reconstruct the IQMS. The following recommendations are therefore made:

- Communication channels that allow an accurate flow of information from teachers, schools and provincial DoEs to national levels are required. Time is needed to implement targeted interventions to build capacity on national, provincial and school levels to affect quality teaching and learning. The majority of the work to put in place a teacher education policy framework, based on sound principles, has been completed. Reforms must now focus on quality and equity, even if this means slowing down the pace of change, and implementing smaller-scale district- and school-level interventions at the expense of more rapid, large-scale reforms that have only scratched the surface of the huge equity- and quality-related challenges.
- Clear, specific frameworks are required to guide provinces and institutions to build teacher capacity. Pilot programmes that have been successful should be deployed at district and national levels, rather than be subjected to complex reforms which transform them by the time they reach teachers. The National Framework for Teacher Education and Development has already been criticised as 'too general to provide clear guidelines for providers' (Taylor et al., 2007, p34). This is a waste of resources, and could further demoralise teachers disillusioned with successive waves of ineffective reforms.

- Interventions are required to improve relationships between national and provincial DoEs, HEIs providing teacher education, and schools. Increased learning needs to take place at national level to inform policy formulation and implementation. This should be accompanied by professional, competent training at each level, to increase capacity and awareness of educational stakeholder's rights and responsibilities at each level, and strengthen trust.
- To maximise funding, careful consideration must be given to educational investments. Increasing the system of piloting interventions can support this process.
- Greater voice must be accorded to all stakeholders, and information fed into planning that links clearly to teacher education policy. The rushed teacher education implemented to deal with curriculum reform shows that teacher education policy must continue to work towards its goal of being *ongoing*. Teachers should be able, during training, to express their opinions and concerns, see the benefits of reforms and the reasons underlying them. Teachers will not implement reforms they do not understand or see the benefit of, particularly if it is perceived to increase their workload.
- Stronger and more effective policies must be implemented to redress persistent imbalances in access to teacher education programmes amongst certain groups. As demonstrated during the discussion of most policies, inadequate resourcing, high PTRs and low human capacity are still restricting progress.
- Institutions require greater government support. Funding must match the ambitious nature of reforms and teacher education must be moved into a higher subsidy category.
- Increased efforts are necessary to reach potential teacher trainees in rural areas and shortage subjects. The reinstatement of funding bursaries to select groups is a step in the right direction, but must be further increased.
- Courses should be carefully monitored, in particular ACE courses that have rapidly diversified without evaluation of the benefits of such institutional freedoms to trainee teachers in terms of choice, quality and relevance.
- The introduction of the 2007 Teacher Education Policy Framework is a positive step towards having a streamlined, comprehensive system in place. This must be further strengthened through regular systematic reviews that take advantage of progress in the EMIS system. Any such documents should outline actions taken, impact made, further steps for development and coherent ways in which these will be achieved. This should be linked to benefits for teachers and a logical teacher career-pathing strategy that allows teachers to stay in class, while also providing salary benefits and rewarding good practice. Development of the IQMS system and separation of developmental and accountability performance evaluation components could enhance this.
- IQMS accountability frameworks must not hold teachers solely responsible for imparting democratic values and raising attainment. This is in direct contrast with the aim of promoting democratic systems in which students, parents, teachers and the schooling system have shared authority and responsibility in the education process.
- Adequate, ongoing support in initial training and CPTD programmes is required to support curriculum implementation. Knowledge and skills must balance the content and pedagogical skills teachers require to be effective, confident practitioners.
- School systems should capitalise on human expertise in schools, and give additional responsibility to teachers in designing and delivering training. This has the potential to strengthen teachers' voice and democratic systems, as well as the union between the teaching workforce, HEIs and governmental agencies.
- The SACE requires government support and capacity building to monitor and evaluate training programmes successfully, in particular CPTD. Monitoring systems

must ensure that minimum levels of quality are achieved in the variety of training courses on offer, including BEs whether by HEIs or by DoE distance learning programmes. Information systems must comprehensively show the number of graduates at each institution, and the subject specialisms they have. Targeted action can afterwards aim at redressing persistent imbalances and improving supply and demand.

- The GoSA must find a way of balancing budgeting requirements with the right to free, quality education for all. What is feasible is a gradual phasing out of all school fees in the public sector, such as has taken place in the Western Cape. This should include the indirect costs of education, such as uniforms and school equipment in addition to fees.
- Initial teacher education must focus more on the practical elements of teaching. If this is limited to the final year alone, or non-existent in the case of distance education courses in which students enrol after high school, there is a disconnect between theory and practice.
- SGBs require training on what their roles are, how this relates to the school and management team, and how they can carry out their duties effectively. This is urgent in many poor and rural schools.
- Greater attention must be paid to the context in different schools and provinces. Minimum PTRs, resources and training are pre-requisites for successful curriculum reform. While the GoSA has tried to enforce rapid change, it may have been more useful to take a staged approach, in which progress was perhaps slower but of greater quality.

### **International implications**

South Africa is one of many countries seeking to increase access, quality and equity in education through teacher education policy reform. Therefore the findings have wider implications internationally, and in particular within the sub-Saharan African region.

- Increased spending and policy reform are insufficient to create change. This must be accompanied by an increase in efficiency within a systemic approach.
- Positive action, while carried out with the aim of creating and monitoring more equitable systems, still places the focus specifically on race issues. South Africa has, as yet, been unsuccessful in overcoming such divides.

### **3.4.3. Gaps and future research possibilities**

There is a clear discrepancy between the success of policy implementation at district and school levels, ranging from excellent examples of inspired change to schools and teachers fabricating evidence to conceal the lack of policy implementation. A comprehensive comparison of schools in each quintile and each district may help identify successful measures and systemise reform to help transform policy into practice more comprehensively.

Further, the current case study used the wide set of fragmented policy documents that were available for analysis. It would be useful in the short- to medium term to undertake a systematic analysis of the impact of more streamlined policy documents, such as the 2007 Teacher Education Policy Framework. In this document, the GoSA acknowledges shortcomings in NCS and IQMS implementation and pledges to increase teacher training and carry out reforms. Further research could strengthen the findings of the current study and allow more clear linkages to be made between specific policies and impact.

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### 3.6 Appendices

#### 3.6.1. Policy documents relating to teacher education

##### 'Norms and Standards for Educators in South Africa'

<b>Norms and Standards for Educators in South Africa</b>
<b>Learning mediator:</b> The educator will mediate learning in a manner which is sensitive to the diverse needs of learners, including those with barriers to learning; construct learning environments that are appropriately contextualised and inspirational; communicate effectively showing recognition of and respect for the differences of others. In addition an educator will demonstrate sound knowledge of subject content and various principles, strategies and resources appropriate to teaching in a South African context.
<b>Interpreter and designer of learning programmes and materials:</b> The educator will understand and interpret provided learning programmes, design original learning programmes, identify the requirements for a specific context of learning and select and prepare suitable textual and visual resources for learning. The educator will also select, sequence and pace the learning in a manner sensitive to the differing needs of the subject/learning area and learners.
<b>Leader, administrator and manager:</b> The educator will make decisions appropriate to the level, manage learning in the classroom, carry out classroom administrative duties efficiently and participate in school decision making structures. These competences will be performed in ways which are democratic, which support learners and colleagues, and which demonstrate responsiveness to changing circumstances and needs.
<b>Scholar, researcher and lifelong learner:</b> The educator will achieve ongoing personal, academic, occupational and professional growth through pursuing reflective study and research in their learning area, in broader professional and educational matters, and in other related fields.
<b>Community, citizenship and pastoral role:</b> The educator will practise and promote a critical, committed and ethical attitude towards developing a sense of respect and responsibility towards others. The educator will uphold the constitution and promote democratic values and practices in schools and society. Within the school, the educator will demonstrate an ability to develop a supportive and empowering environment for the learner and respond to the educational and other needs of learners and fellow educators. Furthermore, the educator will develop supportive relations with parents and other key persons and organisations based on a critical understanding of community and environmental development issues. One critical dimension of this role is HIV/AIDS education.
<b>Assessor:</b> The educator will understand that assessment is an essential feature of the teaching and learning process and know how to integrate it into this process. The educator will have an understanding of the purposes, methods and effects of assessment and be able to provide helpful feedback to learners. The educator will design and manage both formative and summative assessment in ways that are appropriate to the level and purpose of the learning and meet the requirements of accrediting bodies. The educator will keep detailed and diagnostic records of assessment. The educator will understand how to interpret and use assessment results to feed into processes for the improvement of learning programmes.
<b>Learning area/subject/discipline/phase specialist:</b> The educator will be well grounded in the knowledge, skills, values, principles, methods, and procedures relevant to the discipline, subject, learning area, phase of study, or professional or occupational practice. The educator will know

about different approaches to teaching and learning (and, where appropriate, research and management), and how these may be used in ways which are appropriate to the learners and the context. The educator will have a well-developed understanding of the knowledge appropriate to the specialism.

*Source: Stellenbosch University (2000)*

### 3.6.2. Background data on country

**Table 12: South African statistical educational indicators**

<b>Country data and indicators, 2007</b>	
School-age population (in thousands)	7 134
Teacher stock	236 032
Pupil-teacher ratio	31
Repetition rate (%)	8
Gross enrolment ratio (GER)	103
Observed average annual growth 1999-2007	0.8
<b>Projections for 2007-2015</b>	
<b>Change in Stock</b>	
School-age population (in thousands)	7 175
Teachers needed by 2015	240 835
Absolute change in teacher stock	4 803
Average annual growth needed (%)	0.3
<b>Recruitment due to attrition</b>	
Teachers to fill vacancies based on a 3.5% attrition	56 793
Teachers to fill vacancies based on a 5% attrition	94 655
Teachers to fill vacancies based on a 6.5% attrition	123 825
<b>Total recruitment needed</b>	<b>335 248</b>

(Source: UIS, 2009, pp. 36-41)

**Table 13: Human Development Indicators: South Africa (2007)**

Country	HDI value	Life expectancy at birth (years)	Adult literacy rate (% ages 15 and above)	Combined gross enrolment ratio (%)	GDP per capita (PPP US\$)
Highest scoring	Norway (0.971)	Japan (82.7)	Georgia (100.0)	Australia (114. 2)	Liechtenstein (85,382)
South Africa	0.68	51.5	88	76.8	9 757
Lowest scoring	Niger (0.34)	Afghanistan (43.6)	Mali (26.2)	Djibouti (25.5)	Congo (Democratic Republic of the) (298)

(Source: UNDP, 2009)

**Table 14: National percentage of schools in each quintile per province**

<b>Province</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Eastern Cape	34.80%	21.60%	21.00%	11.60%	10.90%
Free State	30.80%	14.90%	20.10%	18.80%	15.40%
Gauteng	10.50%	11.40%	27.40%	27.20%	23.60%
KwaZulu-Natal	24.20%	18.80%	25.60%	17.30%	14.10%
Limpopo	34.00%	22.30%	24.90%	11.60%	7.20%
Mpumalanga	16.70%	20.20%	29.80%	19.90%	13.50%
Northern Cape	26.30%	17.70%	21.60%	14.80%	19.60%
North West	22.70%	15.20%	30.50%	20.50%	11.00%
Western Cape	6.50%	8.00%	23.10%	27.70%	34.60%
South Africa	20.00%	20.00%	20.00%	20.00%	20.00%

Source: Create (2009, PB7)

**3.6.3. Functions and powers of the SACE (extract from the Educator Employment Act, 1998)**

**28.** (1) Subject to this Act and the National Education Policy Act, 1996 (Act No. 27 of 1996), the South African Council for Educators shall—

- a) establish minimum criteria and procedures for the registration or provisional registration of educators;
- b) keep a register of the names of all persons who are registered or provisionally registered;
- c) promote professional development of educators;
- d) establish a code of professional ethics for educators which shall apply to all educators registered or provisionally registered with the Council;
- e) establish a fair and equitable enquiry procedure and appoint a committee to investigate an alleged breach of the code of professional ethics;
- f) have the power to—
  - (i) caution or reprimand;
  - (ii) impose a fine not exceeding one months' salary on; or
  - (iii) strike from the register the name of, an educator found guilty of a breach of the code of professional ethics, and may suspend a sanction imposed in terms of subparagraphs (ii) and (iii);
- g) subject to the approval of the Minister, determine compulsory monthly fees payable to the Council in respect of educators for whom registration with the Council is compulsory;
- h) advise the Minister on any relevant aspect or if so requested by the Minister;
- i) have the power to appoint staff and to determine their conditions of service;
- j) have the power to establish committees and assign functions to them; and
- k) subject to this Act, perform any function which is necessary for the proper functioning of the Council.

### 3.6.4 Department of Education key priorities for the 2007/8 financial year

1. Human resources are the most important instrument in ensuring the provision of quality education. In this financial year the management and development of human resources will receive added attention, in collaboration with Branch G in regards to teacher education in support of provincial education departments, through:
  - a. Improving the effectiveness of the teacher performance system, as part of the integrated quality management system, through working with provincial education departments to ensure that all schools develop effective plans and schedules and undertake meaningful assessments and teacher development plans. District managers will also be provided with the tools to conduct stringent moderation of the school based assessments. The Department of Education will also appoint part-time moderators to evaluate the implementation and outcomes of the 2007 assessment processes. Towards the end of the year a framework for a national education and evaluation unit will have been developed. These measures would impact on the improvement in learning and teaching and ultimately the provision of quality education.
  - b. The recruitment of teacher personnel is currently is not systematised and a strategy is required to ensure that every learner has a qualified educator in the relevant subject area in time. To this end the stock of new teachers in training will be increased through the provision of full cost bursaries to aspirant educators. The supply and demand at school level will be dealt with through the development of a recruitment strategy and system.
  - c. An assessment of the effective utilization of teachers at schools will be undertaken and plans developed as to how schools match teachers supply to curriculum demands. Schools will need to report on the quality of applicants for posts and where no suitable applicants are available channels will be opened for them to recruit educators from outside the country.
  - d. In regards to focussed provision, every school will required to offer Mathematics and the teacher requirements and provisioning thereof will be determined.
  - e. The post allocation system will be revamped in order to assist schools in reducing class size and the scheduling of educators to curriculum needs. Teacher allocations will be matched to availability of classrooms.
  - f. Schools will also be required to fill vacant posts within specific time's frames as allowed in the Educators Employment Act and if they are unable to comply the Provincial Education Department will have to fill the post on their behalf.
  - g. A profile of the teacher utilization by subject and qualifications will be produced by the end of the year.
  - h. The Human Resource Management Information will have been mapped out and this system will ultimately lead to an operational database system to manage all non-salary related aspects of education human resource management.



# **4. Chapter four: Case Study of Uganda**

## **Introduction**

Since the initial Government White Paper on Education in 1992, the Government of Uganda (GoU) has sought to transform the education sector through policy and planning that has often been innovative and bold. This is exemplified in Uganda being amongst the first countries to enshrine Universal Primary Education (UPE) objectives in national legislation, and the first to implement Universal Secondary Education (USE) policy. Nonetheless, important challenges to Uganda meeting the targets of access, equity and quality remain. The implementation of UPE and USE has arguably been to the detriment of the quality and equity indicators, with an increased number of pupils entering an education system without the necessary financing, teachers, resources and infrastructure to cope. Uganda is still in the process of significant policy reform to meet the EFA targets. Teacher education is a key component of the reform; the current case study discusses policy and practice related to teacher education in Uganda, its impact on educational access, equity and quality; possible ways forward; and internationally relevant findings.

### **4.1. Methodology**

#### **4.1.1. Uganda as a case study**

Uganda makes a good case study for several reasons. Firstly, there is a rich body of literature available on Ugandan education policy, as it has been the subject of many reviews, studies and evaluations. Secondly, Uganda shares challenges that are relevant for other developing countries: implementing UPE while considering quality and equity issues, dealing with increased post-secondary enrolments as UPE graduates filter up, maximising external assistance while maintaining a sustainable approach, dealing with issues relating to HIV and AIDS, and deciding the role NGOs and private partners have in these processes. Thirdly, Uganda is widely considered to have succeeded in many education reforms, particularly at the primary level, and was one of the first countries to implement UPE, and the first to implement USE. Fourthly, the Ugandan government recognises teacher education as central to successful educational development, and significant policy reform has occurred in relation to teacher recruitment, deployment, retention and training. Such reform affects the stakeholders, including the government, NGOs, districts, local schools, and private partners. Finally, change has often taken place in innovative ways, such as the growth of distance education and 'crash' teacher education courses, the results of which are of further international interest. The above factors allow for an analysis that is both broad in scope and in depth. This desk-based study focuses on teacher education policies in Uganda. The main documents reviewed include:

1. Government publications on teacher education policy and programmes, including legislation, white papers, green papers, country reports, education plans and reviews. These were retrieved from official Ministry of Education and Sport (MoES) sources plus other sources. Documents include the Report of the Education Review Commission (1989), the Government White Paper in 1992, the Education Strategic Investment Plan (ESIP) in 1998, and the Education Strategic Sector Plans (ESSP) in 2004 and 2007;
2. Published articles, books and conference papers on teacher education in Uganda. These were found by undertaking an in-depth search of relevant academic journals in the fields of international education, teacher education, development and law;
3. Non-academic documents. These include EFA reports, and country and regional reviews from key organisations, including the GoU, UNESCO, the World Bank, the UIS and OECD.

#### **4.1.2. Limitations of the review**

While every effort has been made to provide a comprehensive and robust analysis, the following limitations are acknowledged:

- 1) Many documents were difficult to locate and obtain including PTC policies.
- 2) Data were difficult to report accurately, as the numbers often varied from source to source.
- 3) Several policies brought in recently have yielded too little information to draw substantial conclusions on the impact of these policies. USE and the thematic curriculum were both introduced in 2007 and literature on their impact is just starting to emerge.

#### **4.2. Country context: Uganda**

##### **4.2.1. Socio-economic profile**

Uganda is a land-locked country bordered by Kenya, Tanzania, Rwanda, the Democratic Republic of Congo and Sudan. Its population is estimated at roughly 30 million with a growth rate of 3.4 per cent per annum, among the highest in the world (UNDAF, 2006). The majority of the population is of school-going age (Kisubi, 2008). A civil war lasting from 1971 to 1985 left Uganda debt stricken and dependent upon external donor assistance to finance key sectors, including that of education and health. Budget support from aid accounted for nearly 30 per cent of aid flows in 2008-2009 (UNDP, 2009).

Despite these challenges, Uganda has achieved a marked reduction in poverty and had one of the fastest growing economies in East Africa over the previous two decades. Annual GDP growth averaged over 6.4 per cent between 1988 and 2007 (UNDP, 2009). While Uganda is placed 157<sup>th</sup> out of 182 countries on the Human Development Index (UNDP, 2007), the percentage of the population living below the poverty line declined from 56.4 per cent in 1992-93 to 31 per cent in 2005-06 (UNDP, 2009). This constitutes notable progress towards the 2015 MDG target of 28 per cent, but high poverty levels, over one million people infected by HIV and AIDS, political instability and fragile prices on exports continue to place a burden on reaching the targets and add pressure to the annual government budgets.

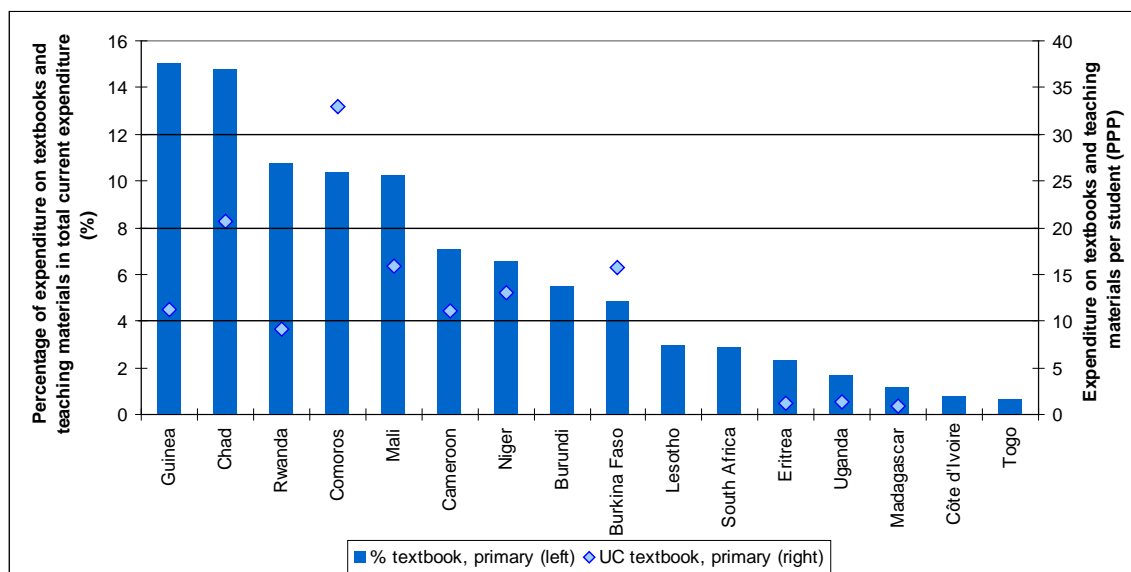
Uganda has also made significant progress towards equality: the Gini coefficient increased from 0.365 to 0.408 and 33.2 per cent of women occupy legislative seats (UNDP, 2009). Yet, women face significant challenges to achieving an equal status to men. 32 per cent of women aged 10 and above are illiterate, only 36 per cent have reached primary school level and 18 per cent achieved secondary school level. The absorption and retention of females in education remain important challenges (UNDP, 2009).

##### **4.2.2. The Ugandan education system**

###### **4.2.2.1 The education budget**

Education is funded by government expenditure and donor assistance. Teacher salaries account for half of educational spending (33% of the government budget) with classroom building and textbooks also taking up a large share of spending. Nonetheless, Uganda still spends little on textbooks and teaching materials in comparison to other sub-Saharan African (SSA) countries (figure 4.1).

Figure 4.1: Expenditure on textbooks and teaching materials at primary education level, in proportion to total current expenditure



Source: Chapter 5?

Estimates were initially that the education budget would increase by 76 per cent from 2003 to 2014, driven by GDP growth, and that government expenditure for education would increase from 19.4 per cent to 21.2 per cent (ESIP, 2004). However, expenditure has in fact decreased from a post-UPE high of 24 per cent in 2001-02 to 17.3 per cent in 2009-10, and the government is severely restricted financially (IMF, 2010). There have been concerns in the past that 30 per cent of the budget allocation did not reach the schools (Ablo & Reinikka, 1996). High levels of inefficiency still exist at the primary level of schooling, caused by 1) resource leakage between the government and schools, 2) leakage of resources within the school and high head teacher, teacher and student absenteeism, 3) teachers being deployed ineffectively to meet the demand and 4) the inappropriate allocation of resources, as class sizes are largest in the lowest grades and smallest in the upper grades (Winkler and Sondergaard, 2008).

#### 4.2.2.2 Structure of the Ugandan education system

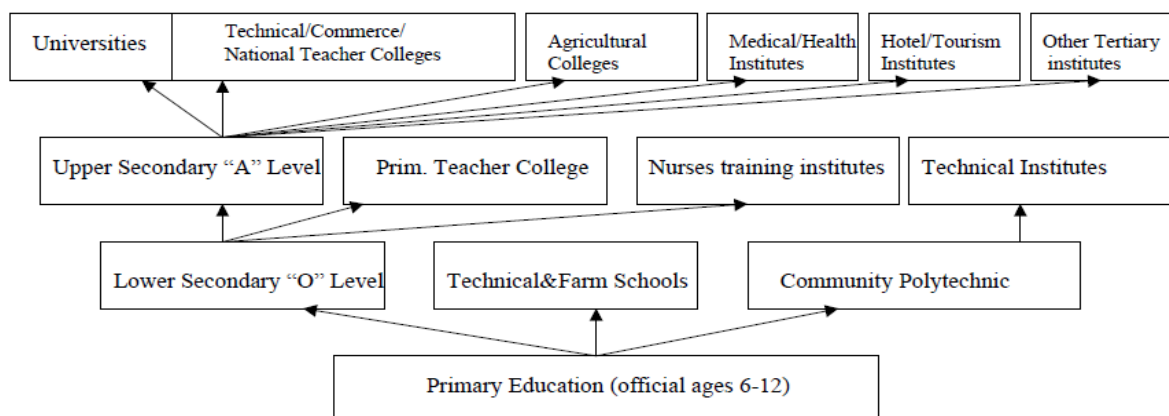
##### Overall structure:

The Ugandan education system is largely decentralised. Under the Local Government Act of 1997, nursery, primary, special and technical schools fall under the management of District Councils. District councils have the authority to develop and implement plans in relation to the overall policy, but the central government remains responsible for policy control and standards (teacher education, curriculum and examinations) while the responsibility for education development lies with the MoES. The MoES has seven technical departments headed by Commissioners, who are supervised by and answerable to the Director of Education<sup>38</sup>. The departments are 1) Pre-primary and Primary Education, 2)

<sup>38</sup> With the exception of the Commissioner for Education Planning.

Secondary Education, 3) Technical, Vocational and Business Education, 4) Higher Education, 5) Special Education and Career Guidance, 6) Teacher Education and 7) Education Planning. There are also semi- or fully autonomous Ministry institutions: the National Curriculum Development Centre (NCDC), Uganda National Examinations Board (UNEB), Education Standards Agency (ESA), Makerere University, Education Service

Figure 4.2: Uganda's educational structure



Kyambogo University and the National Health Service Training Colleges. The education system comprises “formal, non-formal and informal systems” (MoES, 2001). Figure 4.2 and Table 4.1 outline Uganda’s education system.

Source: Liang, 2004

Table 31.1: Uganda's Education System

Education Level	Cycle (yrs)	Award	Progression
Pre-Primary	2	-	Primary Education
Primary Education	7	Primary Leaving Examination (PLE)	7. Lower Secondary 8. Technical School
Lower Secondary	4	Uganda Certificate of Education (UCE)	<ul style="list-style-type: none"> <li>• Upper Secondary</li> <li>• Primary Teachers College</li> <li>• Technical Institute</li> <li>• Other Departmental Training Institutes</li> </ul>
Technical School	3	Certificate	Technical Institute
Upper Secondary	2	Uganda Advanced Certificate of Education (UACE)	12. University 13. Uganda College of Commerce 14. National Teachers College 15. Other Departmental Training Institutions
Primary Teachers College	2	Certificate	National Teachers College
Technical Institute	2	Certificate	Uganda Technical College
Uganda College of Commerce	2/3	Diploma	University
National Teachers College	2	Diploma	University
Uganda Technical College	2	Diploma	University
University	3/5	Diploma/Degree	Post Graduate studies

Source: MoES (Government White Paper on Education); SAECMEQ, 2010.

## **Basic education**

Altogether, around 90,000 children were enrolled in 1,724 pre-primary schools in 2008, a small proportion of the 3.5 million children of this age (IMF, 2010). The government prioritises the primary sector, which was evident in the allocation of 65 per cent of the education budget to primary education in 2006 (MoES, 2006). In total, there are 16,600 primary and 3,020 secondary schools throughout Uganda. Educational institutions are owned by the government, private sector or community organisations. 73 per cent of primary schools are government run, in contrast with only 32 per cent of secondary schools (Verspoor, 2008). The number of private establishments may in fact be even higher, as some estimates indicate that only 35 per cent of private schools are registered on Uganda's EMIS, with others not being licensed or registered, or failing to respond to questionnaires (Verspoor, 2008). The remainder of the secondary schools comprise 57 per cent private schools and 12 per cent community schools.

## **Business, Technical, Vocational Education and Training**

Business, Technical, Vocational Education and Training (BTVET) comprises a large section of post-secondary education and is expanding at a relatively rapid rate. 133 public institutions and 600 training service providers offer training at the level of craftsman, technician and engineer (IMF, 2010). Figure 4.3 outlines the type of institutions offering post-primary level courses.

Figure 4.3: the type of institutions offering post-primary level courses.

*Source: EMIS, 2008, in IMF, 2010*

## **Higher education**

Enrolments increased from 25,682 to over 30,000, and although these are still male dominated, the proportion of females increased from 25 to 39 per cent of the total enrolments (IMF, 2010). The Ugandan government recognises that university graduate numbers have implications for the skill levels of the population, and has ambitious plans to increase HE enrolment ratios from under 5 per cent to 15 per cent by 2015 (ILO, 2010).

Enrolment in Uganda's 145 HE institutions has already increased substantially, from 10,000 in 2000 to 180,000 in 2009 (ILO, 2010). The quality of HE remains low, however, as it is plagued by the same constraints as the primary and secondary levels of education: overcrowding, inadequate facilities, and a failure to attract the best staff (ILO, 2010). A supply-demand mismatch also means an insufficient number of students is enrolled in science and technology courses, and thus the demands for economic growth are not being met.

### Teacher education

Secondary teacher training institutions face a difficult supply-demand challenge. Current government policy emphasizes science and maths in the secondary education curriculum. Secondary students take maths and three science subjects, which require more qualified teachers. Training institutions must train a third of their total applicants in these subjects to meet the demand. However, there is an insufficient number of school leavers with A-levels in science and maths, and teacher-training institutions still face shortages despite lowering the entry requirements (secondary teacher-training institutions require two A-level passes; previously the requirement was four). This mirrors a trend following UPE to lower entry requirements to boost teacher numbers, which risks lowering teaching quality. To combat this, certain private teacher training universities offer pre-entry programmes focused on boosting subject knowledge.

### Certification in the Uganda education system

Selection and certification occur with national examinations at the end of the primary education level, at the Ordinary level of secondary school and at the Advanced level of secondary school. These are, respectively, the Primary Leaving Examination (PLE), the Uganda Certificate of Education (UCE) and the Uganda Advanced Certificate of Education (UACE). Alternative certificates exist for students choosing the technical education track, including the Uganda Junior Technical Certificates, taken at the end of three-year post-primary technical farm programmes, and the Uganda Advanced Technical Certificate, taken at the end of post-secondary technical programmes. The current assessment system in Uganda is described in table 2.4 below.

Table 32.2: An overview of assessment in Uganda

Type		Name/Identifier	Level	Main purpose
Examination	Primary school leaving examination	PLE	End of Primary	Certification – entry to secondary schools
	Uganda Certificate of Education	UCE	End of Lower Secondary	Certification – entry to upper secondary
	Uganda Advanced Certificate of Education	UACE	End of Upper Secondary	Certification – entry to university
	Junior Technical Certificate	JTC	End of 3-year post-primary technical farm programmes	Certification – entry to post-secondary technical programmes
	Advanced Technical Certificate	ATC	end of post-secondary technical programmes	Certification – entry to Business, Technical, Vocational Educational Institutions and Teacher Colleges
Large-scale	National	NAPE (National	Primary and	Monitoring

<b>assessments</b>	assessment	Assessment of Progress in Education)	secondary	benchmarking
	Regional and international assessment	MLA: Monitoring Learning Achievement survey – UNESCO/UNICEF, 1999 SAECMEQ: Southern Africa Consortium for Monitoring Educational Quality, 1998, 2003	Primary	Monitoring benchmarking
<b>Continuous assessment</b>	CA		Classroom	Classroom-based monitoring of performance

### 4.2.3. UPE, USE, quality and equity in education in Uganda

#### 4.2.3.1 Universal Primary Education

Uganda initiated UPE policy in 1997 to overcome severe systemic inequalities and align itself with international goals for the right to basic education for all (Kisubi, 2008). The GoU initially agreed to fund up to four children per family, which has subsequently been opened to all children. This included tuition fees from Primary 1 to Primary 7, with transportation, uniform and school supplies remaining the parents' responsibility (Grogan, 2009). Primary enrolment increased rapidly, from 2.7 million in 1996 to just under 7 million in 2000 and 8.2 million in 2009 (IMF, 2010; Kisubi, 2008). Increases in GER and gender parity are outlined in Tables 4.3 and 4.4 below.

Table 33.3: Gross Enrolment Ratio and Gender Parity Index in Uganda

<b>Gross Enrolment Ratio &amp; Gender Parity Index (GER &amp; GPI)</b>								
<b>Stage of education</b>	1999 Female	1999 Male	1999 (M/F)	GPI 1999 (M/F)	2007 Female	2007 Male	2007 (M/F)	GPI 2007 (M/F)
<b>Pre-primary</b>	<i>4</i>	<i>4</i>	<i>4</i>	<i>1.00</i>	<b>4</b>	<b>3</b>	<b>4</b>	<b>1.05</b>
<b>Primary</b>	119	130	125	0.92	117	116	116	1.01
<b>Secondary</b>	8	12	10	0.66	20	25	23	0.83
<b>Tertiary</b>	1	2	2	0.53	-	-	-	-

Source: EFA - GMR, UNESCO (2010), Data in italics are UIS estimates and data in bold are for the school year ending in 2008.



Table 34.4: Net Enrolment Ratio and Gender Parity Index

<b>Stage of education</b>	1999 Female	1999 Male	1999 (M/F)	GPI 1999 (M/F)	2007 Female	2007 Male	2007 (M/F)	GPI 2007 (M/F)
<b>Pre-primary</b>	-	-	-	-	2	2	2	1.04
<b>Primary</b>	-	-	-	-	96	93	95	1.03
<b>Secondary</b>	-	-	-	-	18	20	19	0.90
<b>Tertiary</b>	-	-	-	-	-	-	-	-

Source: EFA- GMR, UNESCO (2010), Data in italics are UIS estimates and data in bold are for the school year ending in 2008

The data show an increase across all stages of education after UPE. GER numbers were high, as education became accessible to a larger proportion of the population. Despite progress in enrolments, UPE has arguably caused as many challenges to equity and quality as it has solved, due to challenges that “range from inadequate infrastructure, irresponsible attitudes of some key stakeholders, misallocation and misappropriation of funds and materials, and misconceptions about the policy” (Kisubi, 2008). Initial UPE enrolments did not mean the corresponding number of students took the UPE leaving examinations, as only 22 per cent of the original 1997 cohort reached P7 by 2003 (Grogan, 2009). The rapid rise in student numbers was unmatched by human and material resources, which meant a proportional reduction in proxy quality indicators such as the number of teachers, textbooks, classrooms and desks per child. Between 1997 and 1999, PTRs jumped from 40:1 to 60:1 and pupil:classroom ratios (PCRs) from 85:1 to 145:1. Classroom construction projects lagged behind their due completion dates. Projects expected to take six months took up to a year as government funds were lacking, and when available were not released on time or were diverted by local government (Kisubi, 2008).

When student numbers increase, so does the demand for teachers. However, an insufficient number of teachers has been trained to cope with UPE enrolments and there is a high proportion of unqualified teachers. This is high in comparison with other SSA countries, such as Malawi and Rwanda, which have a rate of over 90 per cent of qualified teachers compared to under 70 per cent in Uganda in 2007 (Chapter 3 from Yusuf). The system lacks the capacity to train a sufficient number of new teachers and upgrade the skills of unqualified teachers (Aguti, 2002). The GoU has taken steps to reduce the 'post-UPE' quality dive. For instance, the ratio of textbooks to students in core subjects increased from 4:1 to 2:1 between 2000 and 2005 (MoES in IMF, 2010). PCRs also decreased, reaching 72:1 by 2009 (IMF, 2010). However, sources must be treated with caution, as the reported PCRs were at 106:1 in 2000 (IMF, 2000), which is significantly lower than in Kibusi's report. PTRs have fluctuated, from 65:1 in 2000 to 48:1 in 2006 and 52:1 in 2009 (IMF, 2010). The number of classrooms built between 2000 and 2005 increased by 60 per cent under the government's Classroom Completion Grant and School Facilities Grant (IMF, 2010). Nonetheless, there remains inequality in PTRs among the districts, varying from a low of 32 to a high of 93 (Mulkeen, 2010, in Teachers for EFA, 2010).

Dissatisfactory teaching and learning conditions following UPE led to a decrease in pupil achievement, from 48 per cent of pupils achieving 'satisfactory' scores on national mathematics tests and 92 per cent in English oral tests in 1996, to 31 per cent and 56 per cent respectively in 1999 (Kibusi, 2008). Attainment remains low, with UNEB reporting in 2005 that only 38 per cent of Primary 3 and 30 per cent of Primary 6 students reaching expected competency levels in Literacy, and 14 and 33 per cent respectively in Numeracy (Altinyelken, 2010a). Primary completion rates were modest and, worryingly, decreased from 62.9 per cent in 2001 to 49 per cent in 2008 (IMF, 2010). Dropouts were accentuated as motivation to continue school is low when failure is likely before secondary level and basic levels of Literacy and Numeracy skills are not attained.

To improve the situation, the government provided grants to over 4,000 primary schools between 1990 and 2000, has paid PLE fees since 2000, and implemented programmes to expand the non-formal education (NFE) sector to reach a wider range of students (MoES, 2001). The government recognises the role of private and NGO providers in education and is committed to strengthening public-private partnerships. Two private universities were licensed in 1999-2000. Of particular relevance to teacher education, the government pledged to provide free education to 31,900 students at PTCs and 9,000 students at NTCs (MoES, 2001). Partnerships with the private sector have also been developed successfully in relation to TVET and NFE programmes (Verspoor, 2008). The GoU has therefore made efforts to take a sector-wide approach, and expand access at all levels of education.

However, the MoE lacks the capacity to deal with registering private schools and the process is slow, which discourages private institutions from registering. This is an area of concern as educational quality in unregistered institutions is difficult to monitor. If the GoU wishes to capitalise on public-private partnerships, funds must be provided to register and monitor private institutions. This may be facilitated by the establishment of the Department for Private Education (Verspoor, 2008).

#### **4.2.3.2 Post-Primary Education and Training (PPET)**

Although attention to PPET initially lagged behind UPE, Uganda is the first country to formalise post-basic education through USE. Before USE, the secondary education landscape was a desperate combination of low enrolments, high dropout rates, bottlenecks from primary to secondary (around 50 per cent) and from O-levels to A-levels (around 25 per cent), low student achievement, gender disparities and intense inequity (Liang, 2002). Additional challenges included (Liang, 2002, pp. xi-xiv):

1. Weak management capacity;
2. An overloaded curriculum;
3. Inefficient use of teachers, with a need to increase PTRs and teacher timetables;
4. Poor teaching conditions and insufficient resources;
5. Inefficient and inequitable public financing, with costs that prohibit the poorest from enrolling and remaining in school.

These have hampered Uganda's ability to achieve its potential in terms of developing human capital for economic progress. In light of this, the progress made is significant. USE increased secondary enrolments by 25 per cent between 2006 and 2009, from 814,087 to 1,165,355. Gender parity is almost achieved, with 45 per cent of enrolled students being female (IMF, 2010). While USE is far from achieved, Uganda has succeeded in raising GER and NER scores, as well as gross intake rates into Secondary 1 (IMF, 2010). The number of classrooms more than doubled between 2005 and 2009, and Uganda has succeeded in

maintaining relatively stable PTRs and PCRs<sup>39</sup>. Measures to improve facilities and increase access include building additional schools, rehabilitating existing schools and expanding their capacity and providing grants to community and private schools (MoES, 2001). This is considered more cost-effective than building new schools. Over 270 grants were provided between 2000-2003 (MoES, 2001). Quality in secondary education remains low, mainly due to unequal teacher distribution, inefficiency and poor resource management (IMF, 2010). This is reflected in low attainment. National Standardised Tests for Senior 2 students in 2008 showed that minimum competency was achieved by 89.1 per cent in English, 69.4 in Maths and only 36.7 in Biology (IMF, 2010).

The government has also undertaken strategies to increase access at the tertiary level. Two additional public universities, the University of Kyanbogo (responsible for teacher education curricula) and the Northern University of Agriculture and Environmental Sciences, were opened in 2000, while the University of Makerere increased its capacity for enrolments by 25 per cent. Tertiary education institutions have introduced district quota systems to ensure access to public universities is more equitable (MoES, 2001). Sponsored places have doubled at two public universities (from 2,000 to 4,000 and 350 to 700), and 13,566 students were sponsored at TBVET institutions (MoES, 2001).

#### **4.2.3.3 The education policy environment**

The Government White Paper of 1992 is considered the cornerstone of modern education policy in Uganda. The White Paper drew heavily on work by the Education Policy Review Committee (EPIC) set up in 1987 to inquire into educational policies and recommend strategies to improve the system. The White Paper accepted EPIC's major recommendations and includes all levels and types of education, including teacher training and NFE. This paved the way for much legal reform, including the introduction of 6 African languages into primary education (Alidou et al., 2006). Main policy reform includes the following:

1. Decentralisation of Education Services Policy (1992): Led to the Local Government Statute of 1993. This was the initial step for decentralisation, strengthened by the Constitution (1995) and Local Government Act (1997), which gave local government additional responsibility for local councils, sub-counties and divisions.
2. The Primary Teacher Education (PTE) curriculum: Developed based on White Paper recommendations and EPIC findings. The PTE was designed to train teachers in two-year pre-service and three-year in-service training programmes. The PTE curriculum linked key areas of teacher competence with assessment, and was introduced in 1994 under the Teacher Development and Management System (TDMS) discussed below.
3. The Education Strategic Investment Plan, 1998-2003 (ESIP): Sets out medium-term objectives to be achieved, prioritising UPE and equality. Districts were encouraged to focus on recruiting teachers and building classrooms to cope with UPE enrolments (Republic of Uganda, 1998). A teacher recruitment and deployment drive was launched in December 1999. By the end of 2001, over 6,200 additional classrooms had been built (Kisubi, 2008). To attract teachers, monthly salaries increased from \$8 to \$72 a month between 1992 and 1997 and to \$80 in 1998. Teachers in hard-to-reach areas received 20 per cent extra pay and housing incentives. Different forms of multi-shift and multi-grade teaching were experimented with to manage enrolment and PTRs.
4. HIV and AIDS policy: Drafted in 2001 and reviewed in 2004, considerable delays in

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<sup>39</sup> Secondary PTRs were at 1:18 in 2000 and 1:19 in 2008; PCRs decreased from 54:1 in 2000 to 46:1 in 2007 (IMF, 2010).

implementation meant it was not yet in place in 2008.

5. Universities and Other Tertiary Institutions Act (2001): A legal framework for managing Higher Education Institutions (HEIs) was established.
6. The Education Sector Strategic Plan (ESSP) 2004-2015: Builds on ESIP and is a medium-term plan presenting policies prioritising increasing access, quality, equity, public-private sector partnerships, and building government capacity at central, district and local levels. This was replaced with an updated 2007-2015 ESSP in 2008.
7. The Education (pre-primary, primary and post-primary) Act (2008): Consolidates and streamlines law relating to the development and regulation of education and training in Uganda. Objectives are 1) to give full effect to the government's education policy; 2) to give full effect to the decentralisation of education services; 3) to give full effect to the government's Universal Primary Education Policy; 4) to give full effect to the government's Universal PPET Policy; 5) to promote partnership with the various stakeholders in providing education services; 6) to promote quality control of education and training and 7) to promote physical education and sports in schools. The Act stipulates that the government is responsible for 'evaluating academic standards through continuous assessment and national examinations'. It is an act which makes the most explicit commitment to universal PPET opportunities.
8. Thematic curriculum (2007): New curriculum focused on child-centred instruction and teaching in the local Language of Instruction in the early years of primary, both intended to improve Literacy and Numeracy levels and curriculum relevance.

The GoU recognises the role educators play in supporting an efficient, quality education system and its policy shows strong political will to improving the quality of teaching.

#### **4.3. Teacher education context and policy environment**

Teacher attrition in Uganda seems within the sub-Saharan average<sup>40</sup>, at 5 per cent per annum at the primary level and 6 per cent at the secondary level (Teachers for EFA; TFE, 2010). Retirement accounts for only 6 per cent of teacher attrition, even lower than other SSA countries. In Zanzibar and Malawi, retirement accounted for 9.8 and 11.5 per cent of attrition respectively. In comparison, 11 per cent of primary teacher attrition is due to deaths (TFE, 2010). Perhaps most significantly, 8 per cent of primary and 16 per cent of secondary teachers move to non-teaching posts. Uganda has a long way to go to succeed in retaining teachers. Higher rates of secondary school attrition may reflect higher qualifications at this level, meaning increased opportunities to move jobs (TFE, 2010). HIV and AIDS also affect attrition. AIDS-related deaths peaked in the mid to late 1990s, accounting for 25 per cent of teacher attrition.

Uganda has recruited an impressive number of teachers, with an increase from 74,000 in 1995 to over 158,000 in 2009 (IMF, 2010). Most recruitment occurred before 2005, since when numbers have stabilised. The number of qualified teachers has also increased; untrained teachers decreased from 28 to 11 per cent between 1995 and 2009, as outlined in Table 4.5 below:

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<sup>40</sup> Between 2 per cent in Eritrea (no differentiation provided between primary and secondary levels) to 10 per cent at secondary levels in Lesotho and Malawi.

Table 35.5: Number of teachers (1999 and 2007)

Education stage	Teaching staff				Trained teachers (per cent)						Pupil/teacher ratio	
	School year ending 1999		School year ending 2007		School year ending 1999			School year ending 2007			School year ending	
	Total (000)	% F	Total (000)	%F	Total	Male	Female	Total	Male	Female	1999	2007
<b>Pre-primary</b>	3	70	2*	70*	-	-	-	-	-	-	25	42*
<b>Primary</b>	110	33	132	39	-	-	-	93	93	94	57	57
<b>Secondary</b>	-	-	54	22	-	-	-	-	-	-	-	-

Source: EFA GMR 2010, (\*) Data are for the school year ending in 2006

There are 158,000 teachers in the system. At the pre-primary level the majority of teachers are female, with the ratio favouring males at the primary level. At the secondary level only 22 per cent of teachers are female (MoES, 2006). However, the ratio has decreased at the P6 level in numeracy, from 41 per cent in 2000 to 33 per cent in 2005 (MoES, 2006).

Despite the recognised role of educators in building the education system, the largest inefficiencies occur in teacher utilisation (Winkler and Sondergaard, 2008):

- Less than 25 per cent of teachers were found teaching in class during unannounced school visits, with many absent from school altogether;
- Teachers are not deployed to areas with the severest shortages;
- Early primary classes had the highest PTRs and the older classes the lowest.

#### 4.3.1. Primary teacher education (PTE)

Primary school teachers in Uganda may be trained at Primary Teacher Colleges (PTCs, for two years), National Teacher Colleges (NTCs, for upgrading, also for two years) or university (three years; Nzioka and Ramos, 2008). This leads to either 'Grade III' teaching certificate, diploma in primary education or Bachelor of Education Degree (BED) awards. PTE is the responsibility of 47 PTCs, 45 of which are government funded and 6 privately funded. Each NTC has 450 places, but some may not have a student population of this size (University of Sussex, 2010). Of 45 government-owned and funded PTCs, 23 are core institutions that run pre- and in-service programmes and 22 are non-core institutions that have only pre-service programmes (University of Sussex, 2010). Minimum entry requirements are an O level with a pass in six subjects, including mathematics, English and two sciences. Applicants must join within two years of taking their O levels. A Level graduates may not be interested in becoming primary teachers as, logically, they would apply to join a PTC with minimum qualifications (University of Sussex, 2010).

The teacher-training curriculum is the same for each PTC, set by Kyambogo University, which has the mandate for PTE and training teacher educators. Teacher-training programmes are overseen by the Department of Teacher Education (DTE) which sets policies and appointments and supervises administration and professional development programmes. Government grants of US\$ 1,500 per student per day are paid to colleges to cover pre-service programme expenses. The programme consists of two years of training in content and pedagogy with three eight-week placements in schools. The in-service programme covers four years where trainees attend college during school holidays with two school placements. Students undertaking the in-service programme are self-funded. There is the option of upgrading a Grade III certificate to a diploma (Grade V), which can be obtained through nine centres on a part-time basis over two years. One motivation for undertaking a diploma is to become a head teacher with a higher salary. Teachers can become teacher educators by undertaking the diploma, although this has undergone a review with recommendations to change to a bachelor programme<sup>41</sup>.

#### 4.3.2. Secondary Education Teacher Training

NTCs and accredited universities offer programmes ranging from one to three years, that lead to a Grade V diploma, Bachelor of Education Degree, Bachelor of Science with Education degree (BSc. Ed) or Post-Graduate Diploma in Education (PGDE; Nzioka and Ramos, 2008). Table 4.6 outlines the teacher qualification structure and postings available upon qualifying.

Table 36.6: Structure of teacher preparation in Uganda

Level	Institution	Admission	Duration	Award	Teacher posting
Primary	PTCs	S4 and S6 leavers	2 years	Grade III certificate	Primary schools
Secondary	NTCs	Grade III and S6 leavers	2 years	Grade V Diploma	Primary schools, secondary schools, PTCs
Tertiary	Universities	Grade V, S6 leavers and graduates	1-3 years	PGDE, degree	Primary schools, secondary schools, PTCs, NTCS and university

Source: Nzioka and Ramos, 2008, p57.

Higher levels of education open a wider range of opportunities for teaching. The number of secondary teachers has increased at an average of 2000 per year since 2000 (Clegg, Bregman, & Ottevange, 2007). At this time, it was recorded that 34 per cent of secondary teachers were graduates and 41 per cent held diplomas. Regional disparities are still in place, and teacher qualifications vary greatly between regions, as does gender.

#### 4.3.3. Continuing Professional Development (CPD)

CPD programmes are primarily the responsibility of teacher educators with a Diploma in Teacher Education (DTE), issued through the TDMP. The DTE has undergone reform in recent years. CPD is developed through Co-ordinating Centre Tutors (CCTs) deployed to 539 co-ordinating centres (CCs).

<sup>41</sup> See Section XX.

#### **4.4. Teacher policies: enhancing access and improving quality**

##### **4.4.1. A more progressive curriculum?**

The GoU has implemented significant curriculum reform to become more progressive and aligned with policy. The most notable areas of change have occurred in policies relating to the Thematic Primary Curriculum, Language of Instruction, and HIV and AIDS.

##### **4.4.1.1. The Thematic Primary Curriculum**

###### **A. Policy context and rationale**

Primary curriculum reform was initially hampered by setbacks. The design of the curriculum began in 1992, with implementation taking place only between 2000 and 2002. Yet “what was finally produced failed to secure the ownership of the MoES and the major stakeholders”, who felt that insufficient attention was paid to literacy and numeracy skills, particularly in the early years of schooling (Penny et al., 2008). Language policies “remained vague and encouraged the use of languages without orthographies and supporting literature, whilst local language teaching was given insufficient support and guidance” (Penny et al., 2008). The curriculum had high cost implications, was poorly supported by teacher training, had insufficient learning and teaching materials, lacked an implementation plan, budget and a specific department with responsibility for its launch and assessment, and Continuous Assessment (CA), supposed to support the introduction of the curriculum was delayed and not yet introduced by 2005 (Penny et al., 2008).

Fortunately, the MoES and educational stakeholders identified these shortcomings relatively rapidly (Penny et al., 2008). This led to the Primary Curriculum Review in 2004, which discussed the type of pedagogy that should be adopted, as well as content and implementation. Despite considerable input from the GoU and external education stakeholders, in 2004 the educational sector suffered high dropout rates before P7. NAPE tests in 1999 and 2003 revealed low learner achievement in literacy and numeracy, and high levels of inequality from district to district. Other persistent shortcomings include:

- I. An inability to ensure students had a minimum level of literacy, which decreased parent and student motivation and increased the dropout rate.
- II. Literacy activities were not accorded sufficient curriculum time. Teaching of literacy and numeracy skills was of poor quality.
- III. Teachers and parents supported the use of local LOIs, but an insufficient number of teachers trained locally or materials supported this.
- IV. Most schools failed to deliver official areas of the curriculum. Kiswahili and IPS were neglected in 82 and 40 per cent of schools respectively.
- V. Curriculum time was insufficient to cover content knowledge. Time was wasted due to an overlap of the upper primary and lower secondary curricula.
- VI. There was insufficient financial backing to resource certain areas of the curriculum.
- VII. Classrooms were overcrowded, a problem compounded by high teacher absenteeism.
- VIII. Teachers had insufficient training on the curriculum.
- IX. Pre-service training was not adapted to the new curriculum.
- X. The lack of materials in local languages affected the ability to gain fluency.

In response to this (and in accordance with the trend in many SSA countries<sup>42</sup>), Uganda has initiated curriculum reform based on moving towards child-centred pedagogy through the

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<sup>42</sup> For example, Botswana, South Africa, Namibia, Tanzania, Ethiopia, and Kenya.

implementation of its 'thematic curriculum'. Curriculum content remained largely unaltered, but was characterised by a focus on child-centred learning, thematic teaching at lower primary levels, and using local languages at lower primary levels (Altinyelken, 2010a).

The assumption is that moving away from didactic teaching methods improves the quality of learning, and fosters critical thinking and problem-solving skills. Research on the success of such methods is divided. In certain instances quality and relevance increases. In others, no difference in teaching methods occurs, and teachers are resistant to what they perceive as an additional workload without understanding the purpose of reforms. Effective teacher training is vital for the success of any curriculum reform. In Uganda, findings on the success of implementing a child-centred, outcomes-based curriculum vary widely in different districts depending on school conditions, the quality of teacher training and resourcing. The thematic curriculum was introduced as follows (Read and Enyutu, 2005):

1. June 2004: Based on findings from a Curriculum Review Report, the Primary Education Quality Group makes suggestions for the formulation of the new thematic curriculum. Recommendations aim to raise primary achievement in literacy and numeracy in local LOIs (implications are discussed in section 6.1). This includes increasing the number of hours allocated to literacy and numeracy each week, and 'crash upgrading programmes in [...] reading, number and life skills in lower primary grades' (p5). Concerns about high teacher absenteeism also lead to recommendations that district-level funding should be provided to strengthen monitoring.
2. December 2004 – January 2005: Recommendations are ratified. The MoES sends circulars to districts and schools with information concerning timetabling for the introduction of the thematic curriculum in February 2006 and LOI considerations. The MoES requests that orientation guides be distributed to key education stakeholders.
3. March – September 2005: A Thematic Curriculum Review Panel consisting of 20 Early Childhood Education specialists is appointed. Domestic costs are estimated and external advisors contracted to provide support. Work on curriculum development takes place, with the review panel and external advisors confident that deadlines for the publication of the final drafts were on track for a February 2006 launch.
4. September 2005: The thematic curriculum launch is delayed, as conditions for successful implementation are not met by October 2005. The government struggle to define specific LOI policies for lower primary, provide sufficient funds to ensure minimum resource levels and ensure a comprehensive teacher training plan is in place, with sufficient funding to provide basic training for P1 before the February 2006 launch.
5. February 2007: After a one-year pilot phase in 90 schools in 11 districts in P1 in 1996, the thematic curriculum is launched nationwide. The pilot phase in P2 is launched simultaneously in 2007 (Altinyelken, 2010).

The type of teaching required to implement child-centred activities is considerably different, with implications for teacher training.

## **B. The impact of TPC curriculum**

Although school management teams showed high will to implement the thematic curriculum, constraints prevented effective implementation (Altinyelken, 2010a). Training sessions were given in January 2007 (just before the launch) following a cascade model. Trainers and CCTs were trained in 'thematic curriculum approaches, methodology and requirements', and they then trained teachers (Altinyelken, 2010a, p155). District inspectors of schools also received training to effectively monitor curriculum implementation. There was a disconnect



between official discourse, which stated that training was successful in preparing teachers adequately, and teacher reports. Most teachers found training to be 'severely inadequate', as it was hurried, overlooked certain areas of the curriculum, and was of variable quality, as trainers lacked expertise. Subsequent support visits by trainers and CCTs, and short training sessions, also failed to meet teachers' expectations and left them feeling poorly equipped to implement the curriculum (with the exception of certain experienced teachers). A consequence of this was teachers resenting the curriculum (Altinyelken, 2010a).

Resourcing can at best be described as grossly inadequate, which increased the pressure on already tight school budgets. Textbooks were not initially available and teachers often resorted to making resources themselves, of varying quality depending on the time committed by and skills of individuals. Supervision by CCT and NCDC representatives was sporadic. Visits failed to focus on the aspects of teaching and learning that teachers and head teachers considered necessary, such as monitoring teacher attendance, curriculum implementation, developing report cards and carrying out continuous assessments to ensure consistency among schools. This is representative of the wider challenges to educational monitoring in Uganda, constrained by low human capacity at the national and district levels (with over half of senior inspection positions unfilled or occupied by junior replacements), and a lack of funding to provide support, adequate salaries and cover costs such as transport (Altinyelken, 2010a).

This is particularly relevant for pre-service teacher education for lower primary teaching. Teachers did not have strategies to teach the basic literacy and numeracy skills the curriculum was intended to raise standards in, as preparation was theoretically orientated and in Uganda, the lower the level of education taught, the lower the level of qualifications required. Therefore the least qualified teachers are often assigned to lower-primary jobs. Teachers most often 'reported that they were learning by improvising and practising on a daily basis' and that confidence increased amongst teachers in their second year of teaching the thematic curriculum (Altinyelken, 2010a).

Perceptions of the thematic curriculum were divided. Certain teachers perceived that the TPC simply organised information, timetables and assessments differently rather than bringing about qualitative change. Others saw many intentional positives, such as increased relevance and being more inclusive and fun for learners. They also perceived implementation outside Kampala would be extremely difficult, particularly in rural areas with large classes, poor teaching and inadequate teacher training. A third group perceived the TPC had already had positive effects on quality and were confident that issues could be resolved with time (Altinyelken, 2010a).

While a minority of teachers perceived benefits in getting to know students better by spending increasing periods of time with them, the system of having a single class teacher in lower primary grades led to many objections. Problems when teachers were absent were exacerbated and put increasing pressure on systems with already large class sizes. Teachers also perceived that the TPC increased their workload, as 1) teachers were expected to teach double shifts as classes alternated between morning and afternoon sessions and 2) an increased number of subjects was expected to be planned and taught. Teacher motivation was low, due to the low salaries, incentives, social status of teachers and working conditions. These findings are very similar to those in South Africa. Uganda has lower salaries than the average in SSA, and a lack of progression structures (Altinyelken, 2010a).

Poor conditions in certain areas made implementing the thematic curriculum an unreasonable expectation. PCR of over 70 prevented teachers from implementing child-centred strategies such as spending quality time with groups, giving feedback and catering to the different needs of learners in class. This was exacerbated by the presence of students over the standard P1 age increasing the range of ability levels within the class. Continuous assessment was considered the most important TPC issue. Teachers 'unanimously commented that they learned little about the assessment issue after the training, so they did not know how to carry out continuous assessment in practice' (Altinyelken, 2010a). Most teachers did not implement CA strategies, as classes of 70 students are not conducive to daily student observation and recording individual progress.

#### **4.4.1.2. Language of Instruction Policy**

Uganda features in Save the Children's (2010, p2) list of top 20 countries at 'greatest risk of negative consequences related to teaching in languages children don't know well' and 'likely to face major delays to education, economic growth and stability if they do not shift toward teaching in languages which children understand'<sup>43</sup>. The GoU recognises that children learn better if education takes place in a language they understand. However, they had insufficient local language teachers to provide adequate support, and local language teaching was generally of poor quality.

The Uganda Primary Curriculum Review Road Map (2005) identifies three LOI issues which pertain to the new thematic curriculum. These include financial implications in relation to the production of materials, political and cultural implications and teacher training:

1. Aligning teacher deployment. Teachers should be posted to areas where they are competent to teach in the local language. This places additional administrative demands and challenges on the teacher management system.
2. Ensuring a sufficient number of well qualified teachers trained in local languages.
3. Ensuring the teacher education curriculum at college level is transformed so graduates possess the necessary skills and competencies to teach the key skills of literacy and numeracy in the local language. Also, college lecturers must be able to teach and supervise trainees in local languages.

The GoU revised its 1992 LOI policy in 2007. The new policy does not differ substantively, but it notes that as part of the new thematic curriculum the first three years of primary education must be taught using the mother tongue of their area and English is taught as a separate subject. English becomes the LOI in year four, also known as a transition year. English remains the LOI from P5-7 and throughout secondary level.

#### **LOI in Uganda: the challenge of moving beyond rhetoric**

On paper, Uganda has implemented the many policy changes necessary to effective LOI instruction. Simply recognising the importance of LOI in learning and initiating policy reforms makes Uganda comparatively progressive. Nonetheless, there remains a severe disconnect with practice. LOI was arguably the most controversial element of the TPC, as the range of languages spoken in Uganda adds a cultural-political dimension to decisions (which languages should be taught?) in addition to financial, resourcing and staffing needs (Altinyelken, 2010a). There are further arguments that Uganda's 'early exit model', where children only benefit from LLOI in early primary years, is insufficient and inefficient (Brock-Utne, 2010; Alidou et al., 2006). Uganda faces difficulties in ensuring sufficient materials in the LLOI, as well as sufficient teachers to implement the policy in local areas (Alidou et al.,

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<sup>43</sup> Criteria include the availability of first language education; social and economic divisions between language groups; and links between education, ethnicity and conflict.

2006). This is not helped by English being the main LOI at teacher colleges. This is complicated by a rural-urban divide, with urban schools allowed to retain English as the LOI in lower primary, due to arguments that multiple languages are spoken in any one class. This is perceived to give an advantage to students in urban schools, who have extra exposure to English by the transition year.

Teacher supply and deployment becomes more complex and expensive, which is in part why LOI policy delayed TPC implementation. Altinyelken (2010a) reports that in her study, all schools used English as an LOI from the lower primary level upwards. Teachers acknowledged the benefits of LLOI in supporting literacy skills development, and frequently used local languages orally to clarify and explain concepts.

#### **4.4.1.3. Infusing HIV and AIDS into the curriculum**

Uganda is unique in SSA for having reduced HIV prevalence in the last two decades, from a rate of 15 per cent in 1990 to 6.7 per cent in 2005 (UNAIDS, 2006, in Nzioka and Ramos, 2008). Nevertheless, there has been a lack of emphasis on HIV and AIDS in educational policy and planning, and numbers have begun to stagnate. The MoES does not fund HIV and AIDS programmes through the sector budget, which makes them largely donor dependent, and this impacts on sustainability. A draft policy developed in 2001 and reviewed in 2004 demanded that the MoES “integrate HIV and AIDS education into all levels and institutions within the sector” (Nzioka and Ramos, 2008, p53) but approval was still awaited in 2008. This delay is “arguably to allow the widest possible consultation among all stakeholders” but also demonstrates “a lack of political will [...] to respond to HIV and AIDS” (Nzioka and Ramos, 2008, p53). A further HIV and AIDS education workplace policy developed in 2006 with sizeable donor assistance had not been distributed to all schools due to lack of government funding (Kamugisha, 2007, in Nzioka and Ramos, 2008). This not only demonstrates a lack of political will, but a lack of sustainability and foresight to carry projects to completion. Efforts and funding are being used inefficiently, with the outcomes of projects not reaching local educational stakeholders. The revised ESSP places emphasis on HIV and AIDS reduction strategies (MoES, 2008), which it states are “being implemented”:

1. The Work Place Policy (WPP)
2. Capacity building for HIV/AIDS
3. Counselling and testing
4. Advocacy in relation with HIV/AIDS
5. Implementation of the Presidential Initiative on AIDS Strategy for Communication to Youth (PIASCY) activities in primary and secondary schools.

The link between HIV infection and education in Uganda is clear: those without education are six times more likely to be infected than those with secondary education (TFE, 2010). It is surprising that Uganda has reduced HIV and AIDS incidence while seemingly placing little priority on implementing a systematic education sector approach. The MoES (2008) pledges that the “new PTE Certificate Curriculum will also respond adequately to the key cross-cutting issues that include among others HIV/AIDS”, which indicates an increased emphasis on this key area.

#### ***The impact of HIV and AIDS education and training***

While HIV and AIDS education is a government requirement, it is not surprising that provision is variable and in many cases non-existent, as in 2007, 75 per cent of teachers had not received training (Jacob et al., 2007). There is evidence of HIV and AIDS programmes reaching teachers and schools. Under the PIASCY programme, specific schemes were carried out (MoES, 2007):

- l) 151 national facilitators, 531 trainers and 6,468 master trainers were trained in HIV and AIDS competencies, which are “expected to head behaviour change communication, guidance and counselling in schools and communities around the school”;
- m) Handbooks distributed to 12,974 schools resulted in over 10,000 primary schools having talking compounds with messages on guidance and counselling.

Nzioka and Ramos (2008) report that over half of the teachers trained in PTCs had received two-day training on HIV and AIDS issues, and an additional 18,820 primary teachers received in-service training of at least 16 hours on skills and knowledge. Primary teacher education on HIV and AIDS is provided through the TDMS programme. Policy and practice seem disconnected, as while teacher education curricula contain an HIV and AIDS component, this is lacking in pupil curricula (Education International, 2006; in Nzioka and Ramos, 2008).

Nzioka and Ramos (2008) also looked at a teacher training college and a university's responses to HIV and AIDS. The results were compared with surveys distributed to 58 other HEIs to validate findings. HIV and AIDS education was found to be integrated in the professional studies curriculum for teacher trainees. However, the teacher training college had not provided training for tutors, although some had received training from NGOs. The following increased the risk of HIV for trainee teachers (Nzioka and Ramos, 2008):

1. HIV and AIDS was low on teacher training institutions' list of priorities. One administrator at a teacher training college in Uganda stated it was sixth on her list of priorities. Considerable competing challenges exist (lack of finances, students not having enough to eat) and low prioritisation may increase with low political impetus.
2. Fears about HIV status being 'leaked' lead to on-campus services being underutilised. Staff and students preferred to pay and use services elsewhere.
3. Female support staff and non-teaching staff were vulnerable to sexual harassment by senior staff, who perceived they hold little power and are easily dismissed/replaced.
4. Female trainees with insufficient funds had sexual relationships with senior members of staff/older men in return for money, housing, food or to access facilities available to wealthier students.
5. Students felt peer pressure to engage in sexual relationships, change sexual partners, and have several partners during the course of their studies.
6. Harassment by male tutors was very common. Female students agreed to sexual intercourse in exchange for higher grades, fearing failure if they refused.
7. Female students had intercourse with male students who completed their assignments.
8. Alcohol and drug consumption increased the incidence of students engaging in unsafe sex and was associated with increases in rape and sexual violence.
9. Students experimented sexually with the new-found freedom of college life.
10. Students had to travel far to get access to condoms, which were not provided on campus. This was aggravated by strong religious beliefs leading training institution leaders to be reluctant to encourage and distribute condoms.

These represent considerable barriers to HIV prevention, and lead to the conclusion that HIV and AIDS policy has not yet been successfully incorporated into teacher training. It fails to be considered a top priority by many institutions, which adapt policy according to beliefs amongst the management teams rather than national guidelines. Unprofessional and unsafe practices are prevalent: members of staff abuse their positions of authority, and students fail

to implement sexual behaviour which protects them. NGO programmes supported the services available on campus.

While the GoU has been rather slow in taking assertive measures to ensure HIV and AIDS is formally included in the curriculum, this has taken place to a limited extent. A study of 76 randomly selected schools (including almost 900 students, 450 teachers and over 200 administrative staff) throughout Uganda investigated what participants thought should be taught, how this should be done, what they would change and what they thought perceptions of HIV and AIDS education would be amongst teachers, the community, parents, students and administrators (Jacob et al., 2007). Perhaps the most significant finding was that participants overwhelmingly (around 80 per cent, without significant variance between groups) perceived a need for curriculum change to address HIV and AIDS, with the largest group suggesting it be included in more subjects across the curriculum to allow teachers to tackle issues in class (Jacob et al., 2007).

#### *Curriculum overhaul: a cost-effective endeavour?*

Curriculum reform has implications for the budgetary allocation to resourcing and teacher training. LOI policy has the potential to be a cost-effective investment for the government, as international evidence suggests it can reduce educational spending by reducing dropouts and repetition rates (Save the Children, 2010). A similar effect can be expected of the thematic curriculum, if the quality and relevance of teaching and learning increases, thereby improving student performance and reducing dropout rates.

Increasing the length of time LOI is a local language to the whole primary system and even beyond has the potential to increase achievement and relevance (Brock-Utne, 2010). However, this would require significant additional training for teachers, resources in local languages and effective deployment strategies.

The disconnect between policy and practice remains a concern. Budgetary allocation and policy reform, undertaken at a considerable cost but not fully implemented represents a significant waste of funds. Policies have the potential to represent cost-effective measures in terms of student attainment, retention and enrolment, reductions in HIV prevalence and increasing the relevance of education, but must now uniformly be implemented in teacher education programmes. Only in this way will the effects be felt in schools.

#### **4.4.2. Increasing the number of teachers for hard-to-reach areas**

The number of teachers trained has increased significantly, but the recent stagnation is concerning, as PTRs remain high, and quality low. The teacher growth rate declined from a peak of 0.25 per cent in 2000 to 0.025 per cent in 2004., which was expected as “enrolment and teacher employment gaps have been narrowed” and “the decline in PTRs and PCRS, coupled with the increase in the percentage number of pupils mastering the requisite literacy and numeracy skills as well as the observed increase in P7 completion rates, is an affirmation that the sector is on the right track in its bid to uplift the quality of primary education”. Nonetheless, certain estimates suggest this is grossly inadequate to meet the need for teachers in Uganda, particularly at secondary levels of schooling. To increase transition from primary to secondary would require 80,000 new teachers (or a 9 per cent growth rate per annum) and to meet the government's USE goal an increase of 141,000 or “14 per cent net growth rate in the supply of teachers to the lower secondary system each year” (USAID, 2008, p9).

In recognition of this, the government continues to sponsor places, with “100 per cent government sponsorship of students joining Primary Teachers Colleges and also government sponsorship of 80 per cent of students joining National Teachers Colleges” (MoES, 2008). The GoU is also implementing initiatives to increase the number of teachers, including in rural and marginalised areas, and recruiting high school graduates directly to teacher colleges to boost numbers (USAID, 2008). A persistent problem remains with finding a sufficient number of teachers for marginalised, rural communities and those affected by conflict.

#### **4.4.2.1 Distance education to boost the numbers of qualified teachers**

Distance education in Uganda has the potential to “enhance data collection and analysis, and to strengthen management systems in educational institutions; to improve access to education by remote and disadvantaged communities; to support initial and continuing professional development of teachers; and to provide opportunities to communicate across classrooms and cultures” (Ouma, 2003). However, teachers require training to maximise technologies and support students in using them.

##### *How distance education developed in Uganda*

The GoU sought to implement distance education programmes to expand the HE sector and recommended in its White Paper on Education that an open university “be planned and provided before the year 2000” (Republic of Uganda, 1992, p95, in Aguti, 2002). The Education White Paper pledges that from “1992/93 onwards crash programmes for training and retraining teachers will be mounted. Increased enrolment and training of teachers will be undertaken [...] through the in-service system, training on the job and long distance” (Republic of Uganda, 1992, p4 in Aguti, 2002). A task force was commissioned to investigate this possibility, with the expectation that the Open University of Uganda be established (Aguti, 2002). While this never happened, the GoU has established partnerships with distance education providers to implement an online system of training. This reinforces the capacity of teacher training institutions to overcome the inadequate supply of teachers and upgrade unqualified teacher qualifications (Aguti, 2002). Upgrading efforts included:

- *The launch of the Mubende Integrated Teacher Education Project (MITEP)* for unqualified primary teachers (1992). Although 384 teachers failed and 197 dropped out (of an initial 900) MITEP trained and certified 306 teachers in the province, a significant achievement given the proportion of untrained teachers is estimated at up to 80 per cent (Aguti, 2002). Where teachers did not complete the course, it still improved lesson planning, subject knowledge and teaching methods, indicating a positive influence on educational quality (Robinson and Murphy, 1996 in Aguti, 2002).
- *The Northern Integrated Teacher Education Project (NITEP)* built on MITEP, and launched a distance programme in 1994 using the same materials. NITEP aimed to support the reconstruction process in Northern states affected by the civil war (Aguti, 2002). The project operated on a larger scale than MITEP, aiming to reach over 3,000 teachers and increase the number of trained and qualified teachers by 17 per cent over four years, and assessing the programme's suitability for national deployment (Aguti, 2002). The project used printed materials, audio cassettes, mathematics and music, group meetings at designated study centres, residential sessions and tutor support. The project achieved higher pass rates compared to MITEP, at 66 per cent or 2,051 teachers overall. The programme raised the profile of distance teacher education in Uganda and served as a model for subsequent programmes. The success of these programmes meant several programmes have taken their place in formalised HE programmes.
- *The Teacher Development and Management System (TDMS)*: Deployed nationwide

following NITEP with national development partner support<sup>44</sup>. TDMS was an online programme which developed teacher materials and education curricula, trained teacher educators and set up a network of PTCs to conduct pre- and in-service teacher training programmes. TDMS reached head teachers, teachers and teacher trainers in a decentralised cascading model (from the MoES to Principals, Deputy Principals and Co-ordination Centre Tutors, to the Institute of Teacher Education in Kyambogo, and to District Education Officers. The project upgraded 8,685 unqualified teachers, trained 7,414 Head teachers, 18 Principals, 36 Deputy Principals and 54 Heads of Programmes at PTCs, 539 Co-ordination Centre Tutors and 13,000 volunteer community mobilisers. Although insufficient to meet the demand following UPE, TDMS' scope is considerable and addresses previously neglected management level needs.

- *The Teacher Development and Management System (TDMP)*: Launched as a pilot project aimed at upgrading head teachers' skills (Aguti, 2002).
- *The Diploma in Primary Education*: Launched in 1999 at Kyambogo University. Aimed at meeting UPE needs by increasing enrolment on primary education upgrading courses, increasing opportunities for teachers who cannot attend full-time campus-based programmes and providing a flexible model of education (Aguti, 2002). There is insufficient material to indicate how many students succeeded in passing the course. However, 800 students enrolled in the first year of operation and 1,800 in the second year. The university works collaboratively and shares learning materials with other teacher training institutions. This increases the number of qualified teachers and strengthens communication among institutions.
- *The E-Learning and Teacher Education (ELATE) programme*: Launched in 2007 in a collaborative effort between the Open University (OU) in the UK and Makerere University in Uganda as a two-phase professional development opportunity that brings together teacher trainers, classroom teachers, the Ugandan examinations board, MoES and NGOs, amongst other stakeholders (Makerere University, n.d.).
  1. Phase 1 provides open education resources for trainee and newly qualified secondary teachers. In 2008 over, 800 CD Roms were distributed to schools throughout Uganda and online resources were made available (also used by education professionals in other countries) on the ELATE website (OU, n.d.).
  2. Phase 2 was launched with additional funding from the British Council in February 2009, and "marks a subtle re-orientation towards enabling teachers to better prepare students for the wider job market" (Makerere University, n.d.). Newly designed curriculum materials promote the use of active learning and the development of "transferable work-related skills":
    1. **Personal attributes** – behave appropriately, punctuality, reliability, self-confidence, seek advice, show tenacity and motivation, be self-critical and imaginative.
    2. **Communication** – ability to read, write, listen and speak in appropriate ways for different audiences. Know and apply general and specialised vocabulary.
    3. **Team working** – ability to cooperate and share tasks with colleagues.
    4. **Problem solving** – goal focused, identify constraints, seek out relevant information, evaluate alternatives and make decisions/choices.
    5. **Application of numbers** – ability to work with and present numerical data, using appropriate intermediate calculations.

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<sup>44</sup> Government, IDA, USAID, Royal Netherlands Government, Irish Aid (Aguti, 2002).

6. **Information technology** – ability to use computer software to manipulate and present data, text and pictures, where appropriate and possible.

The above skills are relevant to the many challenges facing teachers in the current Ugandan system. Personal attributes will impact on attendance and communication in LOI.

Challenges to distance programmes include the high proportion of external assistance required to implement and run them, which affects sustainability if funding is withdrawn. Further, salary increases have not always matched the new qualification level of teachers, leading to questions regarding government capacity to fund the increasing number of qualified teachers moving up the pay scale ladder.

#### *The impact of distance education*

Distance education made significant steps towards introducing a complementary method of ensuring an adequate supply of teachers. Even the DPE, which is an upgrading programme rather than adding new teachers to the system, has the potential to improve quality in education, and increase the pool of candidates qualified to apply for head teacher positions, both of which are strongly needed in the current educational system in Uganda (Aguti, 2002). A further strength is the potential for these programmes to have an impact beyond the teachers involved in the programmes, as the materials are available to a pool at the national and international levels, and to increase co-operation among institutions.

Therefore, while not sufficient to meet the demands of UPE, distance education is a useful complementary tool to supplement government efforts in a cost-effective manner. There is the issue of quality to consider, and efforts should be made to further increase the number of teachers, otherwise endeavours to increase quality could be negated as schools are forced to employ unqualified or under-qualified teachers to make up staffing shortfalls (Aguti, 2002). While distance education seems to hold a great deal of potential for increasing teacher supply at relatively low cost and in a way that is accessible to a large pool of applicants, two major shortcomings seem to be holding it back. Firstly, accessing the necessary Information Communication Technologies (ICTs) is a challenge for many trainee teachers, who do not possess or do not have easy access to computers, video players or the internet (Aguti, 2003). Therefore, alternative ways of increasing access must be put in place, such as study centres or sharing resources with other organisations (Aguti, 2003).

Secondly, there is a lack of quality assurance mechanisms in place. This leads to programmes being of variable quality, and also of perceptions that graduates of distance programmes are second rate in comparison to teacher trainees from campus-based programmes (Aguti, 2002; 2003). Experimentation with quality assurance frameworks has taken place within HEIs, but this has yet to be formalised and extended to all distance education programmes. Without a systematic focus on quality, graduates of such courses will not automatically gain the skills required to implement quality teaching and learning strategies.

Kyambogo University has yet to adopt a 'quality assurance system across the board' (Binns and Otto, 2006, p34). However, the department of distance education is progressive in this regard, and committed to providing an excellent quality service and resources to students. KYU aims to continue NITEP's 'culture of care' principle, whereby strong support was required to reduce dropouts amongst students with low academic backgrounds (Binns and Otto, 2006).



#### **4.4.2.2. Increasing the number of teachers for NFE**

##### Policy context and rationale

A number of government-backed NFE programmes exist to increase the number of children enrolled in UPE and the number of individuals taking up teacher training. These were implemented in an effort to provide inclusionary education, in particular for “over-age children, children in pastoral areas and fishing villages and those in labour who are too old to return to school” (MoES, 2006, p41). These make up a sizeable contribution to the education sector, with over 70,000 pupils enrolled in NFE programmes. This sub-sector seems to work to the advantage of girls, who account for 37,750 of those enrolled. Government policies to support NFE programmes include (MoES, 2006, p41):

1. Providing UPE capitation grants, school facilities grants and instructional material grants based on UPE guidelines;
2. Recruiting NFE instructors and including them on the payroll;
3. Developing training modules for NFE educators.

Implementation of these policies was hoped to reduce the rural-urban enrolment divide. From the years 2000-2005, pupil enrolments increased in peri-urban and urban areas, with a notable effect in rural areas (increases from 4,826,911 to 5,766,599) (Byamugisha, 2006). Certain programmes, such as the 'COPE' schools jointly run by UNICEF and GoU, focus on equipping vulnerable children with basic literacy, numeracy and life skills (Alidou et al., 2006). Communities are highly involved and pay teacher salaries. Barriers include an inability to transfer to formal education. Although this should be easy, the cost of uniforms and transport are prohibitive and the structure of education is different. Therefore at 14, the age at which children are no longer eligible to enrol, most children end their schooling (Alidou et al., 2006). There are also problems with consistency with national policy, as the language of instruction at COPE schools and textbooks is English, from Grade 1 up.

##### The impact of increasing the number of NFE teachers

One example of an NGO-Government partnership in the area of NFE is the Complementary Opportunities for Primary Education (COPE) programme, established in 1994-1995 (UNICEF, 2010). The programme aimed to act as a complementary educational choice for over-aged children who had not had access to formal education, focusing particularly on girls and disabled children affected by violent conflict in the north of Uganda. Teachers were recruited “from the immediate community and were given four weeks of pre-service training plus monthly refresher courses, along with weekly supervision from the nearest Primary Teachers College” (UNICEF, 2010, p5). One challenge was securing pay for teachers, as responsibility lay with the community but was difficult to enforce. Further, each school had in place a management committee, made up of a gender-balanced ratio, that included a head teacher from a government school, a parent representative, a teacher, a local leader, a member of the local council, parents and students. COPE worked with UNICEF and the GoU. A particular benefit of the programme was that as the community paid for the teachers, its members felt entitled to demand good attendance and performance. This highlights the advantage of decentralising ownership over recruitment, strengthening monitoring mechanisms in schools and involving communities in the process. Also, as COPE worked with the government, it “created a policy environment conducive to cooperation between COPE and nearby formal schools and teachers’ colleges” (UNICEF, 2010).

These increased access in traditionally hard-to-reach areas, with an enrolment of 3,500 girls and 2,900 boys in the mid to late 90s at COPE and ABEK schools (UNICEF, 2010). This is particularly important as there are insufficient funds to build schools in hard-to-reach areas,

further disadvantaging marginalised communities (Kibusi, 2008). The GoU has attempted to rectify this by funding places in private schools for students who lack access to publicly funded schools. PTRs in private schools that receive government grants are significantly lower than public government schools (Verspoor, 2008). The rich-poor divide risks widening, as disadvantaged families send their children to poorly resourced schools offering low quality of education. Higher dropout rates, lower achievement in PLE, and restricted post-primary opportunities follow suit, and perpetuate the cycle of inequality. NFE programmes have traditionally been able to target 'hard-to-reach' pockets of excluded children.

While UPE had a particularly positive effect on girls and marginalised communities (Grogan, 2009; Nishimura et al., 2008), fewer girls completed primary school (42 per cent compared to 53 per cent of boys), and only one third of girls enrolled in secondary schools compared to half of all boys (ILO, 2010). Challenges include pregnancy, sexual harassment, female genital mutilation and lack of sanitation facilities (MGLSD, 2008; in ILO, 2010). Girls perform worse in national examinations (PLE, UCE, UACE). The National Girls Education Strategy was launched in 2000 specifically to increase access for girls affected by teenage pregnancy, gender-based violence, and the general lack of gender parity in achievement. More support is directed to northern states affected by conflict and with the highest proportion of out-of-school children. A strong benefit of such support is the potential to expand features of NFE to formal education. Examples are work by UNICEF and the GoU to promote gender equity in schools and to put in place 'child and girl friendly' schools. Checklists were distributed to schools for teachers and inspectors to evaluate how child friendly schools were and to improve teaching and learning methodologies in schools (UNICEF, 2010).

#### Cost effectiveness

Distance education is very cost effective, when students remain enrolled and receive quality education linked to practical elements.

There is also a need to ensure projects are sustainable, as there has been a large reliance on external funding to date (Aguti, 2002). Ensuring adequate resourcing and a balance between costly face-to-face sessions and distance methods is difficult for universities that fund themselves solely from student fees (Binns and Otto, 2006).

### **4.4.3. Teacher training, deployment and management**

#### **4.4.3.2. The Primary Teacher Education (PTE) Review**

##### Policy context and rationale

The PTE Review was undertaken with the extensive remit of analysing “pre-service and in-service DEP/DEPE, DTE and PGDTE curricula, and to make recommendations for their revision, especially in light of developments in Primary Education that have not been incorporated into the curricula, in particular the 2000 Primary curriculum and the recently developed thematic curriculum, and initiatives that have been introduced in recent years in Guidance and Counselling, HIV/AIDS, gender, Peace Education, multi-grade, SNE, children in conflict areas, mentoring and Psycho-Social Education” (O’Sullivan and Zerubabel, 2006, p10). A cross-cutting area for analysis was how the review could contribute to increasing the quality of teaching and learning in schools. The review focused on three types of knowledge key to effective teaching: 1) content knowledge, 2) pedagogic content knowledge (how to teach content) and 3) general pedagogic knowledge (effective teaching strategies).

### The impact of the PTE review

A key finding is that curricula are outdated and largely irrelevant, and have not kept up with international and national developments in pedagogy, society or primary education (O'Sullivan and Zerubabel, 2006). O'Sullivan (2010) argues that the DTE inadequately prepares teacher trainers, as it fails to impart strategies to implement the curriculum, and lacks an emphasis on pedagogy. Examinations reinforced this focus, testing memorisation of pedagogical knowledge rather than pedagogical skills to enhance learning (whether students are trainee teachers, primary students or student tutors). Supporting teachers in developing assessment strategies which complement the TPC and traditional summative methods and give a holistic understanding of individual student development is also necessary. This knowledge then forms a solid base upon which teachers can build student skills in an informed way. However, this should not be at the expense of teacher content knowledge, which should be taught with a focus on what is relevant for teacher educators: being confident with the primary teacher education curriculum taught in PTCs. Two recommendations were made regarding curriculum content to increase the quality of teaching and learning (O'Sullivan and Zerubabel, 2006, p11):

- Teacher Education curricula must focus on pedagogy that will enable 1) trainee teachers to implement the new curriculum and raise attainment in all subjects, in particular literacy and numeracy targets and 2) a DTE curriculum that enables trainee tutors to effectively implement the revised PTE curriculum.
- Link the three curricula vertically: the PTE certificate curriculum feeds into the DEP curriculum; both then feed into the BETE curriculum, which replaces the DTE.

Effective teacher training has a direct impact on teaching and learning in primary schools by creating (or not) effective primary practitioners. Teachers will naturally lack the ability to assess reading and writing needs if they have never been exposed to such skills, or how to implement them. Teacher educator training must be context relevant, which means starting from the 'ground zero' of Ugandan classrooms – the resources available, the level of training required, PTRs and PCR. The subjects teacher educators learn and the competences they acquire must be specific to needs in Uganda: pedagogical and content knowledge related to primary education and primary teacher education curricula, knowledge of instructional materials and assessment strategies, supervision, engagement with the community and mobilisation of communities, and professional ethics (O'Sullivan, 2010, p).

How teacher training colleges are managed impacts on the quality of training delivered. NTCs are administered by the Teacher Education Department and have less financial autonomy than other HEIs. Much funding is based on staff numbers (i.e. inputs) rather than outputs in terms of educational quality or the quantity of students graduating. This may lead to inaccurate monitoring, as schools with high inputs may not be the highest achieving in terms of learner attainment or quality teaching and learning. Furthermore, this provides little incentive to improve the efficiency or quality of education (Liang, 2004, p7). Just as is true at school level, PTRs are important in determining the quality of teaching at HEIs. NTCs have the highest PTRs of any type of HEI, with averages at 67:1, compared to ITEK which has PTRs of 8:1. This is less cost-efficient for the GoU, as student subsidies become more expensive (Liang, 2004). Ratios of between 18 and 19:1 are more aligned with 'the industrial world' and if the GoU is serious about increasing the quality of teacher education, appropriate PTRs seems an important concern. The table 4.7 below outlines the characteristics of teachers at different HEIs.

Table 37.7: the characteristics of teachers at different HEIs

	Tec.Voc. Programs	NTCs	ITEK	Universities
Age	40	44	46	42
% female	28%	20%	29%	31%
Years in the profession	10	10	11	8
Years in the current institution	9	8	8	6
% with a diploma	30%	0	0	3.50%
% with a bachelor's degree	35%	89%	0	6.90%
% with a master's degree	35%	11%	86%	62%
% with a Ph.D	0%	0	14%	28%
% with teaching certificate	50%	80%	86%	52%
Hours spent lecturing per week	16	13	7	12
Hours spent in administrative tasks per wk	15	12	26	12
Hours spent planning for classes per week	12	14	14	15
Hours spent grading per week	7	7	12	8

Source: Liang, 2004, p51

NTCs have higher-than-average gender disparities and lower qualification levels than other institutions. There is also the question of whether the pre-service system should be replaced by in-service training. PTCs offering pre-service training are often poorly resourced, with in-service training taking place in CCs (Winkler and Sondergaard, 2008). An analysis of cost-effectiveness, capacity, optimum institution size and strategies for quality improvement should be conducted to make an informed decision. This could be done by “carrying out a survey of PTCs and CCs to estimate the unit costs and the classroom effectiveness of qualified teachers produced by these two different modalities [and] determine the future demand for teachers, taking account of teacher attrition, demographic change, and policies concerning the pupil-teacher ratio and other factors that affect demand. [...The] MoES could [then] determine how many PTCs should remain operating, and identify means of adequately resourcing both PTCs and CCs” (Winkler and Sondergaard, 2008).

The MoES (2008) is in the process of rehabilitating PTCs, and ensuring they have sufficient staff and resources. Post-secondary training is also set to improve, with a focus on student competencies. This will be centred around a new PPET teacher education curriculum set within an efficient TDMS. The PTE review was a central component in making recommendations for the developing capacity and strategies linked to the Primary Teacher Development and Management Project (PTDMP) discussed below.

#### 4.4.3.2. The Primary Teacher Development and Management Project

##### Policy context and rationale

The TDMS was launched in 1994 (funded by USAID), to increase “access to quality learning opportunities for students and teachers and to improve school management and instructional quality, through a training delivery system based on outreach departments in 23 Primary Teachers Colleges (PTCs) which in turn established a network of 540 co-ordinating centres and tutors for clusters of about 18 schools” (Penny et al., 2008). The Education Sector Adjustment Credit was funded by the World Bank from 1998-2001, following which budgetary support has continued through “Poverty Reduction Support Credits” (World Bank, 2004). This was accompanied by the MoES Education Sector Investment Plan (ESIP), with many donors supporting a sector-wide approach to funding and budgetary support, and an increasing role for external educational stakeholder participation. The TDMS aims to improve quality, management and accountability in education by increasing stakeholder participation and support to teaching staff through in-service training/CPD. The PTDM was implemented to support the development of primary school teachers who are “committed, motivated and have the professional skills and ethics to provide quality teaching and learning for every student” (Penny et al., 2008). This was an attempt to redress the imbalance between increases in access and stagnating (arguably deteriorating) educational quality indicators.

The PTDM (2003) is the “successor to the TDMS” (Penny et al., 2008) and outlines recommendations to move the TDMS to a more supportive in-service training system for qualified teachers. The PTDM was implemented in 2004 and aims to strengthen mechanisms for the following (Penny et al., 2008):

- Effective CPD;
- Quality teaching and learning;
- Ensuring entry qualification requirements for teachers entering PTCs are high enough to be adequate filters;
- Relevant teacher training (improve subject knowledge and pedagogical skills);
- Accountability;
- Inspection and supervision;
- PTAs and SMCs;
- The role of head teachers;
- Implementing a career structure for primary teachers;
- Developing quality assurance within teacher education.

This is a challenging, but clearly focused, remit. A key element of the PTDM was ensuring effective inspection services were in place to monitor and support teachers and schools. The ESA was established in 2001 and national programmes of inspection for each level of education were put in place on a rolling three-year basis. While educational inputs (textbooks, etc.) are still evaluated, the focus of evaluation shifted to outcomes-based indicators: inspections are based on set quality indicators, report strengths and weaknesses, take an evidence-based approach and promote self-evaluation, particularly at management levels (Penny et al., 2008).

The PTDM was adopted and integrated into the ESSP (2004)<sup>45</sup>, which outlined the need for collaboration between the NCDC, and mentions the role of TDMS in providing in-service training to all untrained teachers by 2007. The 2004-2015 ESSP was designed to act as a

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<sup>45</sup> The PTE review notes many suggestions made in 2003 and reiterates the role of the PTDM.

framework to underpin policy analysis and budgeting (MoES, 2008). In addition, it states that its key focus (as opposed to the 1998-2003 plan, which focused on access) is quality as “primary schools were not providing children with basic literacy, numeracy or life skills, secondary schools were not producing graduates with the skills and knowledge required to enter the workforce or pursue tertiary education and universities and technical institutes were neither affording students from disadvantaged backgrounds access to tertiary education nor responding adequately to the aspirations of a growing number of qualified secondary school graduates” (MoES, 2008). The ESSP was revised and a new 2007-2015 ESSP was published as six central items had been added to Uganda's education policy agenda (MoES, 2008), as follows:

- a. Bringing the ESSP into full conformance with EFA FTI goals (the ESSP 2004-2015 had been designed to fit within financial constraints);
- b. Improving the quality of primary education through the introduction of local language instruction and a simplified thematic curriculum;
- c. Ensuring that all pupils successfully completing Primary 7 have access to either academic secondary education or BTVET;
- d. Strengthening science and technology education by providing science laboratories, ICT laboratory rooms, and well-stocked libraries to secondary schools;
- e. Increasing participation in tertiary education in order to ensure that Uganda meets its needs for a high-level workforce;
- f. Increasing the attractiveness of the teaching profession through the introduction of a scheme of service that creates a career ladder for teachers and school administrators and differentiates salaries in recognition of career status.

These demonstrate the GoU's concern with primary education *and* PPET, and understanding of how to move the education sector forward. Several additional reforms were added to the revised ESSP, of which the following have relevance to teacher education: 1) improve the provision of instructional materials at all levels of the education system, 2) strengthen the training and in-service support to teachers, and 3) supply housing for teachers in rural areas and for a head teacher, a senior woman teacher and a senior man teacher in every primary school to [...] enhance school-level supervision [...] and] minimize absenteeism (MoES, 2008).

#### *The impact of the PTDMF*

Uganda has a long way to go to achieve a teacher training system that 1) provides continuity between pre-service and in-service training for trainees, newly qualified teachers and CPD for experienced teachers, 2) harmonises local-level needs and perceptions at district and national government levels, 3) equips head teachers and district supervisors with the skills and resources to carry out effective monitoring, 4) develops a career structure in which qualifications and skills are linked to monetary gains that provide sufficient incentives for teachers to strive for excellence while retaining teachers in class and being manageable in government budgets. The MoES (2008) reports that increased focus will be given to these issues in the 2007-2015 ESSP:

*to improve on quality, the subsector has embarked on training of all the Pre-service [...] on how to deliver the Thematic Curriculum. The Scheme of Service for teaching personnel in the Education Service is also being implemented for the teaching personnel as a human resource framework for career progression and development of the teachers in the Education Service. It has been designed to address those issues that have made the profession increasingly unattractive to potentially good teachers in order to make teaching the profession of choice for bright students.*

While policies have yet to yield significant results, this focus is encouraging. The GoU has made efforts to be aligned with international development goals, while remaining within a framework of need at the national level. The ESSP is aligned with MDG and EFA goals (MoES, 2008), and charts progress according to the achievement of each goal, as well as areas for improvement. Over-age enrolments have decreased following the post-UPE crisis, and there has been a substantial increase in the proportion of girls enrolling in school. This is “a result of Affirmative Action and all the efforts to complement UPE policy geared towards the girl-child” (Okuni, 2003), including a National Strategy and Plan of Action for Girl’s Education, developed in 2000, a Girl’s Education Movement (GEM), launched in 2001, and a Gender in Education Policy. There is still progress to be made, as girls are less likely to complete a cycle of Primary Education to P7 (Okuni, 2003). Redressing gender imbalances amongst teachers may improve these ratios.

The PTDMP identified the need to retain teachers, increase the number of female head teachers, review the role of head teachers, review the DTE curriculum, and address the scheme of promotion. Within all of these issues rang the need to review the scheme of service with the aim of clarifying the role of promotion and career progression. Many recommendations made in the PTDMP have been addressed in more recent policy developments. For example, the current Scheme of Service was implemented in 2008 and plays a key role in enhancing quality within the teaching profession whilst also safeguarding teaching as an attractive career choice. A review of the PTE and DTE curriculum has taken place and a new PTE curriculum is currently being piloted.

Measures to improve educational quality and teacher management systems must address deployment imbalances. EMIS data indicates PTRs are highest in poor districts and are not linked to educational outcomes (Winkler and Sondergaard, 2008). Teacher deployment is subject to gender disparities. Only 9 per cent of pupils in a P6 sample of 4,200 children had female math teachers, compared to 25 per cent with female literacy teachers. Only 17 per cent of teachers were female. Urban-rural disparities were more severe (MoES, 2006). Students in the first years of primary schooling are at a particular disadvantage, as the government allocation of teachers is lower than in upper primary (Winkler and Sondergaard, 2008). Teachers lack time for individual students. Combined with few hours spent in class, high teacher absenteeism, and high over-age enrolments, this contributes to poor achievement, high dropouts and student absenteeism. Policy changes that could redress shortcomings include (Winkler and Sondergaard, 2008) the following:

- A. Lower primary PTRs should not be higher than in upper primary;
- B. Increase the stakes of P3 achievement;
- C. Empower communities to reduce teacher absenteeism;
- D. Increase incentives for schools, districts and students to enrol students at the right age.

Incentives for P3 performance could be based on 'value added' measures rather than overall performance, increasing the relevance for low-achieving schools. This seems particularly relevant given that results from NAPE improved in numeracy and literacy for P6, but not in P3, where levels declined slightly (MoES, 2008).

Giving schools power over transfers may improve supply and demand, with teachers not allowed to move to 'popular' schools until a replacement is found (Winkler and Sondergaard, 2008). A second option would be to conduct assessments of school needs, which drives the budget formula, with schools given power to recruit teaching staff as needed. It is also

necessary to strengthen local accountability. This can be done by the following (Winkler and Sondergaard, 2008):

- I. Giving SMCs power over hiring teachers, developing budgets and evaluating head teacher performance;
- II. Implementing adequate inspection systems;
- III. Providing performance-linked incentives that involve communities and teachers in a common goal.

In South Africa, increasing SGB power over recruitment and allowing them to use any surplus budget to recruit teachers has in some cases led to improved deployment, retention and lower PTRs. However, South Africa also exemplifies the importance of directing attention and support to SGBs in poorer areas. Otherwise, divides can increase as parents in richer areas are more educated and have better management skills and time to devote, leading to a system whereby richer schools have effective SGBs but poorer schools struggle to cope<sup>46</sup>.

Resourcing challenges and poor conditions affect teacher absenteeism (Altinyelken, 2010a). Teacher, head teacher and student absenteeism is “the most important source of leakage at the school level” (Winkler and Sondergaard, 2008). The proportion of teachers conducting lessons during unannounced school visits is alarming at under 25 per cent. This issue is key to spending efficiency, as “a 20 per cent reduction in teacher absenteeism would be the equivalent of hiring 5,000 more teachers (at a cost of Ush 12 bn)” (Winkler and Sondergaard, 2008). Measures to reduce teacher and head teacher absenteeism have the potential to impact on teaching and learning by reducing PTRs, improving the quality of teaching, reducing student dropout rates and by acting as a good role model for students.

As regards head teacher competency and CPD, DeJaeghere et al. (2009) undertook a study assessing the importance that 97 head teachers from three areas (Kampala, Mubende and Kaliro) placed on components related to job competence, and how confident they felt in each area. These were 1) administration and management, 2) leadership, 3) instruction and supervision and 4) community and government. While head teachers uniformly reported that all the skills were important with little variation (which the authors argue could either be because they consider all the skills important, or because they are unable to distinguish between them and requiring training), they reported differences in the level of confidence in implementing skills in schools. Most schools in the study were government aided, but in areas with limited government assisted schools, private schools were included. The schools were diverse, being from both urban and rural areas. In Mubende and the rural areas outside of Kaliro, a significant proportion of schools was newly established, with a smaller student intake than schools that were established for longer. Schools in rural areas shared several challenges:

- A shortage in qualified teachers (it is common for schools to share teachers);
- A new deployment policy restricts teachers staying at a school beyond ten years. This has meant that rural and smaller schools have a majority of young, inexperienced teachers;
- Teacher educators felt the new secondary Diploma of Education was too short (at two years), with insufficient teaching practice (just over a month) to inadequately prepare teachers. Most newly qualified teachers end up in less desirable rural areas;
- Students that can afford to leave rural areas attend more desirable schools in Kampala;

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<sup>46</sup> See South Africa case study for a more in-depth discussion of this problem.



- Urban schools have access to electricity but not always to power, which restricts the use of technological equipment. Schools in rural areas lack access to electricity.

The overwhelming evidence is that schools in rural areas have the least qualified and experienced staff, the poorest and least prepared students and the worst facilities. Schools in Kampala varied, as half of them were well resourced with well qualified teachers. Schools with poor resourcing were smaller, as students moved to other schools. However, there was not an overall shortage of qualified teachers in comparison with rural areas. One school in Kampala had 20 teachers with a Bachelor's or Master's degree for 300 students, compared to one in Mubende with seven teachers for the same number of students, only some of whom had the diploma in secondary education. Gender affected the findings, as female staff unanimously reported it was important to build working relationships with staff, compared to 67 per cent of male head teachers. Female head teachers (97 per cent) were also more likely to believe it was important to motivate students to be responsible for their own learning compared to males (84 per cent) and were more confident in attending to special student needs and assessing teacher performance. Geographical area also affected the results, with discrepancies in confidence including the following:

- A. Head and deputy head teachers in Mubende and Kaliro were less confident than urban head teachers in developing a performance appraisal system, assessing school staff, setting school goals, instruction and supervision skills and seeking funds from parents;
- B. Head teachers in small schools were less confident in their ability to motivate students to be responsible for their own learning and securing funds from parents.

Deputy head teachers were generally less confident than head teachers, perhaps indicating they are less experienced. Therefore, CPD for school management may require modification according to the size of the school and whether it has a rural or urban location. Deputy head CPD should aim to prepare them for promotion to the role of head teacher, and allow greater delegation of responsibilities. This has implications for deployment: the situation for teachers is mirrored at management levels, with the most confident (and one assumes competent) head teachers at the better resourced, larger urban schools.

USE is having a negative impact on equity, as the policy is only implemented in "schools which have a fee base that is financially viable for the GoU to pay [...]. In practice, this means that USE is being implemented in schools that have lower fees, which are also those schools that are currently under-resourced and serving poorly resourced communities" (Penny et al., 2008). Therefore "improvements to the quality of teaching and learning in Uganda require coherence and consistency within the system as a whole, including policy and administrative reform, and changes in training, teaching and learning. Training for educators and secondary school leaders must actively involve school leaders in assessing their needs, identifying their strengths and areas for improvement, and providing them resources and adaptive skills to lead complex and changing school environments" (Penny et al., 2008). Furthermore, secondary education is far from 'free', as parental contributions and fees account for up to 50 per cent of the costs per student (Lewin, 2008), with around 16 per cent of household spending on items other than food going to education (Verspoor, 2008). Seventy per cent of secondary dropouts occur due to high cost to parents (Liang, 2002) and only those in the top 25 per cent of earners can afford unsubsidised secondary education (Lewin, 2008, in Verspoor, 2008). While diversifying sources of funding is necessary given Uganda's financial constraints, the GoU must not compromise equity and access as poor families struggle to meet indirect schooling costs. USE policy can help redress this if the

GoU can mobilise sufficient resources and teachers to increase and maintain educational quality and equity.

The MoES approaches USE in a way that seems both ambitious and cognisant of its limitations:

[T]he post-primary system cannot accommodate all the P7 completers who wish to continue their education. The Plan calls for restructuring the post-primary system to give more participants competencies for the workforce and further education. It anticipates that the transition rate from P7 to S1 will increase from the current 45 per cent to 90 per cent. This increase will be gradual, and it will take into account the larger cohorts of the 'UPE bulge', the first of which entered S1 in 2004. About 50 per cent of those who complete S4 are expected to make the transition to S5; much of the remaining 50 per cent will enter the labour market and enrol in BTVET courses.

(MoES, 2008)

Quality assurance mechanisms are inadequate, which "contributes to lack of accountability throughout the system" (Liang, 2004). Liang (2004) argues that this is due to imbalances in power within institutions, as well as the role of HE departments, BTVET, Teacher Education and the National Council being unclear.

#### Cost effectiveness

Uganda must sustain current levels of private investment in education to expand access and increase quality. Much spending comes from household incomes, which are triple the government expenditure on secondary education (Winkler and Sondergaard, 2008). Many public universities rely on student fees to remain afloat. One way to increase the availability of funds at the tertiary level is to diversify cost-sharing schemes, for example through implementing a system of low interest student loans such as in England, where repayments commence once students are employed and earning minimum levels of money. Repayments are relatively low, and are spread over a number of years, to increase the number of graduates opting to take them.

Internal efficiency at secondary levels is low, with similar problems encountered as at primary levels: poor utilisation and deployment. Teacher salaries are relatively high due to the small student intake, and salaries are higher than for primary teachers. This may be unsustainable if the government reaches its USE targets (Winkler and Sondergaard, 2008). The revised ESSP pledges to increase efficiency and quality by (MoES, 2008) are as follows:

- A. Reducing the per student cost of education by reducing students' per term course load;
- B. Reducing the number of courses on offer;
- C. Having a national list of approved core textbooks;
- D. Increasing the standard minimum class size and rationalizing teacher work loads;
- E. Redeploying teachers from schools with a surplus to schools with deficiencies;
- F. Introducing double shifts and multi-grade classrooms;
- G. Requiring secondary teachers to have the skills to teach at least two subjects.

Following the model in countries such as England, where primary and secondary teachers follow identical pay scales with incentives for teaching in more expensive or less desirable areas, may be cost-effective. Challenges to do with poor efficiency, policy enforcement and monitoring are evident in the inadequate deployment of teachers which "appears to bear no

discernible relationship with the measures of need and cost [...or] between funding and proxies for educational outcomes” (Winkler and Sondergaard, 2008). HE lacks internal efficiency, in part due to shared management responsibilities between the Teacher Education Department, BTVET, and Higher Education plus the newly created National Center for Higher Education [NCHE] (Winkler and Sondergaard, 2008). This is reminiscent of the situation in South Africa during apartheid, where fragmented management increased spending and the inability to manage and monitor the education sector efficiently.

While the revisions in the 2007-2015 ESSP are necessary for successful reform, they are also costly, increasing original spending projections by 8,893 billion Ug. Shs, 75 per cent of which would be covered by the GoU and 25 per cent by the private sector (MoES, 2008). If projected reductions in dropout rates materialise (72 per cent less), it would also increase student-years of instruction by up to 26 per cent, at significant cost to the GoU. Uganda lacks the quantity of human capital required to meet its goals, but budget allocation is insufficient to expand the education system sufficiently at PPET levels (MoES, 2008). A significant PPET reconfiguration is planned in the revised ESSP, including an expansion of available PPET tracks to 2/3 year vocational courses that prepare students for entry-level jobs. BTVET will also become more flexible, with provision made for the needs of schools in different types of communities. Again, this has implications for teacher training and deployment.

Entry requirements may inadequately filter suitable candidates for programmes. Between 1998-2000, Kyambogo’s PTC had an average failure rate of 39 per cent. Despite the recognition that this was high it is considered reasonable in the Primary Teacher Development and Management Plan (PTDMP) to maintain standards (Sugrue, Muwanga & Ogam Ojoo, 2003). The PTDMP noted no significant difference in performance between core and non-core students or in-service and pre-service students. High failure rates make programmes costly to run when tight entry requirements could prevent this. The PTDMP noted evidence that the calibre of students improved when entry requirements were raised in 2000. Alternatively, students may be inadequately prepared for examinations; information on whether the curriculum matches assessment would be useful.

Improving efficiency in the primary sector and minimising wastage is important in a country with the educational challenges and financial restraints of Uganda. The MoES recognises that although steps have been made towards decentralisation, this is often beyond the managerial capacity of many districts (MoES, 2008). The revised ESSP “supports a concerted effort to fully decentralise these services” (MoES, 2008). For this to take place, MoES capacity to administer must also be strengthened, quality mechanisms built and public-private partnerships be strengthened.

#### **4.5. Conclusion**

The lack of financial and human capacity and dependence on donors has prevented progress on several fronts. Firstly, projects are often delayed as funding is lacking to ensure minimum conditions for policy implementation are in place. A key example is in the implementation of the thematic curriculum: while the document was in place, financial constraints prevented resources and training from being in place. Secondly, there is the issue of sustainability. Several projects risk being discontinued if funding stops. Thirdly, and related to the second point, projects are not completely launched until donor funding has been received.

As in several other countries, there has been a tendency in Uganda to focus on access at the expense of quality and equity in education. Clearly the education system was not

prepared to cope with the influx of students following UPE. This has made subsequent objectives linked to quality and equity more difficult to achieve. Therefore what needs to take place is a measured approach, whereby achievable targets are set over the medium to long term. This could be done in ways suggested by Lewin (), so that the Zone of Improbable Development does not turn into a Zone of *Impossible* Development, with governments further and further away from achieving their goals.

Attention to the secondary sector is urgent. The government should focus on efficient teacher training systems, formalised public-private partnerships, and efficient monitoring of the private schooling sector.

Uganda seems overrun with a multiplicity of objectives, international and local agencies, funding partners, Ministries, Education Departments and Working Groups. There is a need to simplify the policy framework arena, with the MoES taking overall responsibility for the running of projects under a more streamlined guise. Currently, this can only add to the wastage of funding and resources, and lead to duplication and overlap between different stakeholder efforts. Work in South Africa to simplify the system, by taking measures such as merging teacher education into HEIs, may be worth looking at in this context to see if any policies could be effective in the Ugandan context. This is necessary as currently certain goals seem incompatible: thematic curriculum reform without proper consideration for principle policy elements of LOI, resources and training; and access at the expense of quality. This leads to the question of whether Uganda's political goals are overly ambitious and misaligned with its education goals. In Chapman's (2010, p81) words, while "the benefits of policy tend to be focused, the problems are more diffuse".

While the premise of the thematic curriculum is based on solid foundations, there are insufficient resources, training, infrastructure and low PTRs/PCRs for it to be feasibly implemented. The GoU has not considered where it currently is in terms of readiness for such a curriculum, but rather has put in place an unattainable end point without stepping stones for achievement.

O'Sullivan has highlighted key practices that have contributed to effective learning in Uganda whilst suggesting that input and output definitions of quality should not be the only influences on policy but rather classroom practices should lead to a more definitive diagnosis.

While quantitative indicators suggest that quality in education is improving, there are also worrying trends. These include a reduction in educational spending, a slowdown in the number of teachers trained, corruption following decentralisation leading to funds not reaching the school and class levels, and continued disparity in the positive impact that government spending and policies have on the most marginalised communities (Okuni, 2003). Also necessary is the implementation of a clear career structure, linked to a salary structure which does not mean teachers are tempted to change to more lucrative careers.

High grade repetition, dropouts, and poor performance on international tests indicate quality of learning is low. This also indicates that certain policies are failing to be implemented at local levels. An example is automatic promotion, as students continue to repeat grades, perhaps as teachers feel it will help them succeed in PLE examinations. Therefore a focus is required to implement a successful policy strategy that will have a greater impact on local levels, through increased efficiency and adherence to standards. The ESA has a role in monitoring such progress, or lack thereof.

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