

Educators in Transition: A Case Study on the Challenges and Adaptations during Rationalisation and Redeployment

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ABSTRACT

Rationalisation and redeployment of educators is a problem in South African schools and internationally. The purpose of this article is to explore the challenges and adaptations of educators during rationalisation and redeployment in public schools in Limpopo Province, South Africa. The argument is that the criteria used to declare educators redundant are not consistent. A qualitative instrumental case study was applied using social constructivism as a theoretical base. Interviews with six redeployed educators were conducted. Purposive snowball sampling was used to identify and recruit participants. Permission to conduct this study was granted by the Limpopo Department of Education. Data were coded and analysed by qualitative content analysis. Empirical data revealed that educators do not like redeployment. Educators who are declared redundant choose to resign rather than face redeployment. It can be concluded that educators face a dilemma related to rationalisation and redeployment which makes them fearful and resistant to the process. Education authorities should, thus, ensure that decision-making processes are transparent and inclusive, and should provide professional development and support to educators undergoing redeployment and rationalisation to ensure equitable and successful transitions.

KEYWORDS

Adaptations; challenges; educators; rationalisation; redeployment; transitions.

INTRODUCTION

Rationalisation and redeployment are a thorn in the flesh of most educators in South African schools. In response to apartheid's inequalities in education, the new government of South Africa adopted rationalisation and redeployment. Redeployment is defined as a compulsory movement of educators from schools with low learner enrolment to schools with high learner enrolment (Mosoge, 2012). The purpose of rationalisation and redeployment is to provide schools within a province with an equitable distribution of educators by filling the vacant posts with the existing additional (redundant) educators¹. With redeployment, educators are distributed to needy schools in order to redress a historical injustice, promote equity, and strengthen social cohesion (Mestry & Ndhlovu, 2014; Mosoge, 2012; Mutekwe, 2020; Salmon & Sayed, 2016). When enrolment in a particular school decline for some reason, those educators are obliged to move to other schools where the enrolment increases. In addition, rationalisation and redeployment may occur due to the realignment and merger of schools that can no longer operate due to the decrease in learner enrolment. For these reasons, rationalisation and redeployment of educators have become a continuous process that affects schools and educators across the country. As a result, educators may need to relocate to a new school far away from their original workplace.

South Africa developed the policy of rationalisation and redeployment to address equity and redress the apartheid legacy of inequality in the education system, which left urban schools better-resourced than their rural counterparts, despite the policy being implemented primarily to benefit historically disadvantaged groups (Mzangwa, 2019). The rationalisation and redeployment policy was underpinned by the Employment Equity Act (No. 55 of 1998) and the Employment of Educators Act (No. 76 of 1998). Under the Employment Equity Act, the Department of Basic Education as the employer is required to be fair and impartial when rationalisation and redeployment are undertaken. According to Section 5(1)(b) of the Employment of Educators Act, 76 of 1998, the Member of the Executive Council of Education in each province has the responsibility of determining the post-establishment of the Department, which consists of the number of educators assigned to specific schools and the number of learners. Heads of provincial departments of education must, from time to time, inform each school of new educator posts established.

This study endeavours to address this main question, "What are the challenges and adaptations of educators during rationalisation and redeployment?" The main objective of this study is to explore the challenges and adaptations of educators during rationalisation and redeployment in South African public schools. In particular, the study intends to:

- Determine the challenges of educators during redeployment.
- Assess the extent to which redeployed educators adapt to their new schools.
- Examine whether the redeployment policy is executed fairly and consistently in schools.

¹ The term commonly used for redundant teachers in South Africa is "additional".

LITERATURE REVIEW

Redeployment should be viewed as an act of job rotation, in which individuals are moved between jobs to reduce boredom and to increase their motivation.” (Ekemam & Okpara, 2021), if conducted well. However, in the current context, it appears that educators become depressed when redeployment is necessary because they fear that they will be victimised by their principals by being declared redundant unfairly. In the process of redeployment, Courtney and Gunter (2015) argue that principals determine which educators to retain and which ones to remove. Moreover, No and Nguon (2018) claim that redeployment can be used as a punishment to relocate misbehaving educators, in order to create a situation where there is less need for principals to supervise staff and there are fewer problems at the school.

Regrettably, the policy creates uncertainty about job security by declaring some educators as redundant in their posts. Furthermore, redeployment leads to dissatisfaction among parents and learners who want the redeployment of their favourite educators reversed, creating challenges for communities and schools in the Eastern Cape (Sisulu, 2018). Additionally, most school governing bodies (SGBs) lack the capacity or refuse to cooperate with the process, and some refuse to accept educators from other communities.

Relocation through rationalisation and redeployment can create family-work conflicts. Chepkonga (2021) defines family-work conflict as a form of conflict between roles in which general demands, time devoted to and tensions created by families interfere with the implementation of work-related responsibilities. Educators who transfer to a school that is distant from their homes may cause family tension and fracture marriages.

An example of the problems caused by redeployment is provided by *PSA v Chokoe v Education Labour Relations Council and Others* (JR2147/13) [2016] ZALCJHB 396 (14 October 2016). In this case, an educator’s grievances over transfer were highlighted. The educator in question was initially employed at Westenburg Secondary School as a “Post Level 1 educator” from 2004 to 2012, teaching English and Geography. Due to a staff reduction at Westenburg, she was declared excess staff and transferred to Tlakale, 45 km outside Polokwane. She asked to be transferred to a third school, Taxila, but the principal of Taxila School did not accept her because she was not qualified for the post. Thereafter, the SGB at a fourth school, Greenside Primary School, also rejected her application for transfer because she had no primary school teaching experience. She ultimately accepted the transfer to a school in Bochum, 60 km away, but the long commute from her new residence caused her significant inconvenience and mental distress as a single parent.

Two key issues regarding redeployment arise in this case: lack of the necessary qualifications and the lack of experience in teaching at the correct level. Mashaba and Maile (2018) argue that educators with secondary school qualifications are sometimes redeployed to a primary school. The quality of education is compromised when educators without the proper qualifications are assigned to teach in a phase they are not qualified for.

Much as this phenomenon of rationalisation and redeployment is a national concern, research shows that it is also a global issue. In the United Kingdom, it has been reported by Lindley (2013) that compulsory redeployment negatively impacts the professional lives of educators. In terms of relocation, in Malaysia, there are three significant issues that must be considered when implementing redeployment: family, a place to stay and security (Hisham et al, 2020).

THEORETICAL FRAMEWORK

This study used change management theory as a lens to understand educators' experiences of rationalisation and redeployment. Change management theory in education refers to the application of change management principles, strategies and models to the context of educational institutions, systems, and practices (Moran & Brightman, 2001). It focuses on how educational organisations can effectively plan, implement and manage changes in a way that minimises resistance, promotes successful adoption, and enhances the overall quality of education (Arcaro, 1995). In the field of education, change management theory addresses the complex challenges associated with introducing new teaching methods, curricula, technologies, policies and other innovations (Scott, 2020). Educational change can impact various stakeholders, including students, teachers, administrators, parents and the community. Therefore, change management theory in education takes into account both the practical aspects of implementing change and the human dynamics involved in the process (Jackson, 2019). In line with this study, change brought about by redeployment and rationalisation requires that everyone involved has to accept the change.

DATA AND METHODS

A qualitative exploratory case study methodology was employed for this study to gain a deeper understanding of the subjectivity within redeployment. Qualitative research was used to gather perspectives, opinions and descriptions of the situation. A case study was selected as a strategy and procedure to gather and analyse data (McMillan & Schumacher, 2014). I found the case study most suitable as I was interested in an in-depth exploration from multiple perspectives of the complexity and uniqueness of a particular case. In this study, I explored the phenomenon of rationalisation and redeployment using the paradigm of social constructivism (Kovalainen & Eriksson, 2015).

Sample

For this case study, I selected participants purposively and integrated small numbers of cases according to their relevance (Flick, 2015). Participants comprised six educators who were subject to redeployment. These participants have lived experience of being involved in rationalisation and redeployment, as they were declared additional in their schools and were moved to other schools.

Data Sources

For data collection, interviews and document analysis were used. Face-to-face interviews were conducted with six redeployed educators. Each interview lasted for 30 minutes. For triangulation purposes, the same semi-structured questions were asked to ensure consistency. All the interview sessions were held after school hours as per agreement with the participants to avoid class lesson interruption. The participants in the interviews were comprised of three female and three male educators. The interview process is a flexible research tool that can be used to gather a variety of information, including facts, opinions, narratives, and histories (Atkins & Wallace, 2012). Purposive snowball sampling was used to identify and recruit participants. The second instrument used was document analysis to gain rich and relevant information. The following documents were analysed to regulate rationalisation and redeployment in schools: minutes of the meetings, management plans, post-establishment memos and collective agreements.

Analysis

Data was analysed through qualitative thematic analysis. The researchers followed the six-phase thematic analysis approach proposed by Braun and Clarke (2022). The thematic analysis involves several steps to identify and analyse patterns, themes and insights within the collected data. The specific details of each phase, such as familiarisation with the data, generating initial codes, searching for themes, reviewing themes, defining and naming themes and producing the final report, were followed during the analysis process (Creswell, 2016). By adopting this deductive approach and following the six-phase approach of thematic analysis, the researchers were able to systematically analyse and interpret the data, allowing for the identification of key themes and patterns related to the research objectives (Creswell, 2016).

Ethical considerations

Ethical approval was granted from the University of South Africa Ethics Committee before conducting the interviews. I also obtained permission from the Limpopo Department of Education to conduct a study with educators. The rationale for the research was explained to the participants and permission was requested to audio-record the interviews beforehand. All participants who agreed to participate in this study did so voluntarily. Participants were not emotionally or physically harmed and were free to withdraw from participation without any consequences. Participants signed a voluntary consent form before the interviews. Pseudonyms were used to protect the identity of participants (Fraenkel & Wallen, 2000).

Trustworthiness

This study ensured trustworthiness through member checking, which involved sharing the research findings and interpretations with the participants (Creswell, 2016). Engaging in member checking provided an opportunity for the participants to review and validate the accuracy of the collected data. Additionally, participants were given the chance to provide feedback on the interpretations made by the researcher. By involving the participants in the verification and interpretation process, the study demonstrated a commitment to ensuring that

their perspectives and experiences were accurately represented, as pointed out by Lincoln et al. (2011), who emphasise the importance of incorporating participant feedback in qualitative research to enhance the rigour and trustworthiness of the study.

FINDINGS

Six participants shared their experiences on rationalisation and redeployment. The following themes emerged: uncertainty and fear of the unknown; principals' manipulation of the redeployment processes; resignation amid frustration; and Misplacement of educators through redeployment.

Table 1.

Participants' profiles

Participants: Educators	Teaching experiences	Male /Female	Qualifications
Participant 1	20 years	Female	Bachelors
Participant 2	17 years	Female	Honours
Participant 3	18 years	Female	Honours
Participant 4	19 years	Male	Bachelors
Participant 5	17 years	Male	Honours
Participant 6	22 years	Male	Honours

The themes that emerged are discussed below.

Resistance to redeployment due to uncertainty and fear of unknown

Moving from a school where one has worked for a long time to a new school is not easy. Taking into account the relationships that one has built over a long period with colleagues and learners, doubts and fear torment the mind when thinking of starting a new job at a new school. Data collected from interviews with educators revealed that educators developed a fear of the unknown when they were expected to assume a new post in another school through redeployment. Educator one expressed his fear and emotions in this way,

My experience after I declared in excess at that particular school was that I was afraid of the unknown because I never knew I would be removed from the school I worked at for so long. I was afraid of the unknown because I did not know whether I had to leave the province or maybe I had to be taken to a school far from my home place. I thought of the kids, I thought of those things and I said my God, I will just do it. (Participant 1)

Educators are emotionally troubled once they are declared additional in their schools. A new workstation with new colleagues and learners is another problem.

The fear, the discouragement, the frustration that one had perceived before that maybe I will encounter. When I find an institution where the condition is conducive to learning for the teachers as well as the learners, I feel comfortable. I felt challenged by another new institution that I am attached to now. Those are the challenges that I can say they

are positive. Leaders are not the same. Some are dictators, autocrat and some are democrats. In this institution, a lot of discipline is instilled. Respect, humanity more especially from top to bottom, there is a lot of cooperation, working together among the teachers even the principal as well as the school governing body. (Participant 3)

Principals' manipulation of the redeployment processes

The department provides schools with guidelines and management plans on how to manage rationalisation and redeployment. One of the principles is that the process must be fair and transparent. The Education Labour Relations Council (ELRC) Resolution 6 states that all educators who are affected by the rationalisation and redeployment process must be treated fairly. This study revealed that some principals use their authority to decide who must be redeployed. The curricular needs of the school were manipulated in such a way that it suited the principal and removed those that they do not want. By law, the curricular needs of the school are determined by the SGB but the reality on the ground is that principals decide and inform the SGB of decisions that have been made.

The decision of who must go is not taken in the formal staff meeting, but in the office of the principal before the formal meeting commences as Educator 1 lamented.

We were in a formal meeting.... Lastly, they are announcing surnames to say, Mrs A, Mrs. B, Mrs. C, you are going to leave. Why? Because I thought I was not the last in this school or this stream. They said that it is final. We had to attach our signature. That is why we felt so hot that maybe these things they have discussed it is from the management side... (Participant 2)

Educator 3 supported the statement since the two were coming from the same school and were declared additional at the same time.

It was short notice because he just called a meeting. And when we got there, when I looked at the chalkboard our names were there with the subjects. And my subject was not there, and I didn't know why. Some teachers said that a certain learning area missing there. They said no it is fine. We will explain. That is when I knew that they were phasing out commercial subjects. So, I was not needed there anymore. (Participant 3)

Educator 6 concluded that only the principal decided who must go from his school.

It was the first time that I was redeployed. It was very tough because at that time I was a site steward. We have been workshopped about redeployment, but the final word lies with the principal to say in my team I want this one and not that one. The policy was not clear to us. I have twenty years of experience teaching that particular subject. When it came, it was a surprise to me. (Participant 6)

The comments of Educator 5 were that even scarce subjects were compromised to suit the interests and needs of the principal.

What exacerbated the tension and worry was the criteria that were used. What I detected is that the principal is the one who can decide. Even though there was an indication that we look at the curriculum needs. So, based on curriculum this means, you will also detect

that the needs or the requirements you have are more than those that are favoured by the principal. Another thing that I detected was that more especially the principal or SMT had a pre-plan decision which must be taken in the staff meeting... (Participant 5)

In addition, Educator 4 stated that according to his experiences, principals determine the criteria for redeployment.

I think the criteria that they used are determined by the principal. He is the one who decides how the ball can be played against the teacher that they want him to go to. He can also play the ball in favour of the teacher he wants to retain... (Participant 4)

Lastly, Educator 2 mentioned a unique fact saying while knowing that the principal cannot be redeployed, he took over the learning area of the concerned educator so that the educator can be automatically removed.

I tried to challenge them even though the principal was contrary to what he was saying, as we know that the principal cannot be redeployed. But when it came to the matching of the subject he was there. So, knowing that if he can match with me, automatically I will go. The ones that I was supposed to match with were shifted to another subject such as Life Orientation arguing that they furthered their studies in that subject, meanwhile, any educator can offer Life Orientation. (Participant 2)

It appears that the authority of the principals goes unchallenged in rationalisation and redeployment. The findings suggest that principals dominate the decisions at school. The school management team and the SGB are there to rubber stamp what the principal has decided on redeployment. The findings also suggest that educators do not have any voice when it comes to redeployment. Rationalisation and redeployment are processes that principals may use to streamline their staffing and resource allocation based on changing needs and budgets. While these processes are typically carried out for legitimate reasons, they can be manipulated or used as loopholes by principals to remove or relocate certain staff members for various reasons such as personal bias, discrimination or favouritism (Rapeta, 2019).

Resignation amid frustration

Work relocation is frustrating since it affects one's family, personal life and work lifestyle. The findings in this study revealed that educators who are declared additional have another option. This second option is to resign from work if the conditions of the transfer does not favour them. Some resign when they arrive in the new school whereas others resign the moment they are identified as additional.

Educator 3's comment best illustrates this perspective:

I was very frustrated, knowing that I was going to the new school, new colleagues, you know, it was frustrating, but I had to move... (Participant 3)

Educators who do not want to be transferred to a new school through redeployment often resign. Educator 2 alluded to the fact that educators resign instead of waiting to be redeployed.

In my experience that one has encountered, I assumed that based on those negativities that were alluded to. The two most experienced educators who were supposed to be

redeployed according to the principal terminated their contracts. Immediately when they knew that they were going to be redeployed somewhere they tended their resignation letters.

As I was indicating that even myself if the situation could not go as I thought, I was going to resign and look for another avenue. As a result, the school lost the skills of those experienced educators who resigned... (Participant 2)

The findings suggest that experienced educators resign rather than agreeing to being redeployed. The experience these educators have accumulated becomes a loss to the institution. At the same time, the educators resign prematurely through the pressure of redeployment.

Misplacement of educators through redeployment

Another challenge of redeployment is when educators who work and are qualified to teach in secondary schools are redeployed to primary schools and vice versa. Another example comes from Educator 1 :

I was taken from a secondary school. When they gave me the name of the school, I found it was a primary school. I felt awful since my qualification was for secondary school FET for Grades 10 to 12. When I was told I was going to primary school, I felt the gap from that phase to another phase... (Participant 1)

Redundant educators get frustrated when they are taken from secondary to primary schools. Teaching and learning are affected while they are trying to adjust. The findings suggest that redeployment misplaces educators placing them in incorrect schools.

DISCUSSION

I found that educators resist redeployment because of fear of the unknown at new schools. Maringe et al. (2015) confirmed this finding by saying educators regarded redeployment as a threat that disrupted their teamwork and solidarity; hence, they were reluctant to move. Most additional educators who had been in schools for a long time were not willing to go and teach in other schools leaving their families, friends and colleagues, as perceived by No and Nguon (2018).

Educators described their frustrations with the policy and some opted to resign to avert redeployment. In light of these findings, it is clear that rationalisation and redeployment cause serious problems for educators in schools. Adedeji and Olaniyan (2011) confirm the finding that educators choose to go for early retirement or move to another profession and venture into other avenues rather than face redeployment. This finding has also been supported by Lemon (2004) and Novelli and Sayed (2016) who assert that some educators resigned as a way to oppose being moved, while others appealed the decisions due to marriage, ill health and other concerns.

Rationalisation and redeployment aim to fill vacant posts at schools with redundant educators. However, educators perceive principals as the ones who decide who should go and

who should remain irrespective of the curricular needs of the school. This study revealed that educators felt victimised and so they became reluctant to continue giving their services to the school to which they do not belong. Victimisation is against the law and is regarded as unfair discrimination. The procedure of redeployment advocates fairness and transparency, hence it is observed by unions and monitored by the department. Victimisation may affect the hardest-working educator for the mere reason that he is not on good terms with the principal. This study found that educators who are victimised by principals are declared additional in redeployment plans. A brave principal participant told the truth and said:

“In many cases, I want to tell facts. The majority of principals use emotions. If I don’t want you, this is automatically a possibility; I got a chance to let you go”.

The above findings suggest that the best interest of the child is not considered, but the innate feelings of the principal take priority. Educators are involved in rationalisation and redeployment at the mercy of principals. It is the responsibility of the unions to intervene and lodge disputes in cases where an educator is victimised through redeployment. The literature has found that school principals do not like to take on redundant educators who were regarded as not cooperating with their previous school (Tshinnane et al., 2017). Therefore, these educators continue to be the victims of redeployment in the new schools.

Educators declared redundant sometimes spent months to years before they were placed in the new school. This study found that during these educators’ waiting periods, they were reluctant to work. These findings suggest that additional educators feel they do not belong to that school. Hence, they were reluctant to give their services as required. Indeed, the delay in transfers may traumatise the educator who is kept waiting to be moved to another school. The concerned educator who feels isolated and abandoned loses the will to teach. All that the principals can do to them is to force them to go to class. Ultimately, this attitude affects the results of that school at the end of the year. Tshinnane et al. (2017) confirm that educators who are declared additional become depressed and refuse to teach learners.

In response to the attempts to redeploy educators to new schools, some educators refuse to move (Mahanjana, 2021). This study found that some educators facing redeployment opt to resign rather than be transferred to another school. Rationalisation and redeployment are among the causes of teacher attrition in public schools. Educators opt to venture into other avenues than to face redeployment (Arendse, 2019). The Education Labour Relations Council (ELRC, 1998) makes provision in ELRC No. 6 for educators to take voluntarily severance package. However, the current resolution does not provide voluntary severance packages. Adedeji and Olaniyan (2011) confirm the above findings that educators choose to go for early retirement or move to another profession when they are facing redeployment. These findings suggest that the department loses the best and most experienced educators as a consequence of rationalisation and redeployment.

This study found that additional educators are redeployed from secondary to teach at primary schools, while some are taken from primary to secondary schools. This finding

resonates with Mashaba and Maile's (2018) argument that educators with secondary school qualifications were redeployed to a primary school. As a result, educators get frustrated while teaching, and learning is affected while they are trying to adjust and cope with teaching a new phase.

CONCLUSIONS

This research study assessed the experiences of educators in rationalisation and redeployment. It discusses the frustration and confusion educators encounter when redeployed from school to another school which may be distant from the current school. Educators may resist redeployment for several reasons. Firstly, it often entails personal disruption, necessitating changes in residence, family adjustments and adaptation to a new environment. Additionally, if the new position does not align with their qualifications or professional preferences, educators are likely to resist the move. Uncertainty and unclear communication regarding the redeployment process can generate anxiety and resistance. Moreover, some educators are inherently resistant to change and prefer the familiar environment of their current workplace, while others may resist redeployment due to concerns about the impact on their family. Lengthy commutes resulting from redeployment can also be a significant source of resistance, disrupting work-life balance. Disagreement with the decision to be redeployed, perceived unfairness, and concerns about job security can further fuel resistance. The whole process frustrates and confuses educators who are declared additional and as a result, some opt to resign prematurely. The fact that the redeployment of educators is done annually exacerbates the situation to the extent that even in the new workstation there is no guarantee that they would remain there. It is possible that one educator could be declared additional in every school they are transferred to. The policy of rationalisation and redeployment may address equity in public schools but disregards the individual circumstances of the educators.

Contribution of the Study

This study contributes to educational leadership and management with particular reference to the epistemology of rationalisation and redeployment. In addition, this study identifies the policy gaps that dehumanise educators as victims of the phenomenon.

Limitations

I acknowledge that this study has limitations. Firstly, this study was limited to redeployed educators in one educational district in Limpopo Province in South Africa. I acknowledge that the findings and conclusions derived from this study cannot be generalised to other populations or educational settings based on its qualitative approach.

Recommendations

Education authorities should ensure that the decision-making process for redeployment and rationalisation is transparent and inclusive. This includes clearly communicating the criteria and

rationale behind these decisions to both the affected educators and the wider school community. By involving teachers, parents and relevant stakeholders such as the SGB in the decision-making process, authorities can reduce resistance and enhance acceptance of these changes. Additionally, they should establish mechanisms for educators to provide feedback and voice concerns, allowing for adjustments based on input and ensuring fairness and equity in the process.

Education authorities should provide professional development and support for educators who are redeployed to new roles or schools. This could include tailored training to help educators adapt to their new positions, address skill gaps and align with the educational goals of their new posts. Support systems should also be in place to provide ongoing mentorship, resources and guidance to assist educators in their transition. By investing in the professional growth and wellbeing of educators, authorities can help ensure a smooth and successful redeployment process, benefiting both educators and learners.

Recommendations for Further Research

Future research could investigate the impact of teacher redeployment and rationalisation on student educational outcomes. This would involve assessing changes in student performance, engagement and behaviour in schools where teachers have been redeployed.

Research could investigate the equity and fairness of redeployment and rationalisation practices, particularly with respect to the potential for discrimination or bias. This research could assess whether certain groups of teachers are disproportionately affected by these processes due to factors like age, gender, race or experience. It could also explore the perceptions of fairness among teachers and whether the processes are consistent with legal and ethical principles, such as equal opportunities and non-discrimination.

Research could be conducted across a wider geographical area to determine if the experiences of redeployed educators in other districts or provinces are similar.

Disclosure and conflicts of interest

The author discloses no conflicts of interest.

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