

**THE PROVISION OF SUPPORT SERVICES BY SCHOOL
CLERKS IN THE NORTHERN HIGHVELD REGION OF
THE MPUMALANGA DEPARTMENT OF EDUCATION**

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of masters in Public Administration in the Department of
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I declare that: The provision of support services by school clerks in the Northern Highveld Region of the Mpumalanga Department of Education is my own work, that all the sources used or quoted have been indicated and acknowledged by means of complete references, and that this dissertation was not previously submitted by me for a degree at another university.

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SUMMARY

The effective and efficient provision of services by school clerks has been affected by a number of factors. The study has revealed that the lack of job analysis, description and specification before posts were created, led to the confusion about the duties to be performed by school clerks. The majority of schools studied did not have proper job descriptions for school clerks with the resultant appointment of unsuitable candidates. Only duty sheets were found in some of the schools and they differed from one school to another.

School principals were involved in the selection process in some schools but the lack of training of these officials in administrative functions compromised the effective selection process. The only exception has been observed to be schools that fell under the former Transvaal Education Department (TED). The selection process in these schools seems to have been more inclusive as compared to other departments of education. It has been suggested that the school principal should be involved in all the steps of the selection process as a supervisor of the school clerk.

The study has also shown that the lack of training of school principals in administrative activities has contributed to the lack of development and the establishment of a career path for school clerks. It is not only the lack of training of the principals in general administrative functions that affected service delivery by school clerks but the lack of understanding of the evaluation system by both the principals and clerks. Whenever personnel evaluation was undertaken in some schools, it was solely for promotion purposes and not for the identification of developmental needs.

It has been revealed in the study that the budget allocated to the majority of the schools by the Mpumalanga Department of Education (MDE) had not been used. It is for this reason that a proposal has been made for the training of school principals in courses such as Public Administration Standards offered by the South African Management Development Institute (SAMDI).

In conclusion, the lack of job analysis, description and specification before posts were created resulted in a selection process that was not related to the administrative duties at school. The development of the school clerks was compromised due to the confusion on what constitutes clerical work at school.

CHAPTER 1 ORIENTATION AND RESEARCH REVIEW

1.1 INTRODUCTION

The provision of learner-centered education in public schools necessitates an effective and efficient utilization of all available resources. The Mpumalanga Department of Education (MDE) has a mission to accomplish this objective in consultation with all stakeholders in education.

The school clerk, being one of the scarce resources and an important stakeholder in the education of the child, needs to be utilized effectively to realize the stated objective of the Department. The provision of an effective support service by clerical personnel does have a direct bearing on the success of the school because failure to provide material support such as textbooks and equipment necessary for the education of the child, may be the cause of poor results.

In the search for the effective utilization of school clerks, the duties to be performed by school clerks need to be clarified against those prescribed by regulations which refer to all clerks in the Public Service. The creation of posts for clerical personnel, as well as their appointment, training, development and evaluation and proper school management need to be taken into consideration for the provision of an effective service by these officials.

1.2 PROBLEM STATEMENT

Whilst the departments of education created posts for clerical personnel to provide support services at public schools, the role and responsibility of school clerks seem to vary from one school to another. The Public Service Staff Code (PSSC), which provides for the general conditions of service for all public servants did not cover the activities of school clerks in particular. The Personnel Administration Standard (PAS), on the other hand provides for the different salary levels for the different categories of public servants. PAS describes the duties of a clerk as “the execution of a variety of administrative functions in support of the administration officer”. Neither the PSSC nor the PAS describes the functions of the clerk at school (Personnel Administration Standard: chapter X).

Cognizance is, however, to be taken of the fact that the administrative support service in the Public Service is general and applicable to all state departments. The school environment is different from the environment in administrative offices where support services are provided. The duties of a school clerk are for example different from those of a clerk in other offices such as circuit and district offices. It is therefore necessary to define the duties in the context of the school environment in order to arrive at a uniform job description and duty sheet for all school clerks.

As a result of the general nature of the rules and regulations applicable to all clerks in the Public Service, there might not be procedure manuals or training given to the school clerks, which relate directly to their operations. There might also not be job descriptions in the majority of the schools whilst duty sheets may differ from one school to another. The possible lack of uniformity in respect of the duties performed by school clerks might have resulted in different expectations from the principals and the clerical personnel alike. As a result different expectations and disagreements regarding the functions constituting clerical work at schools, the effective provision of support services might have been compromised in some of the schools which could have had a negative impact on the results produced by those schools.

1.3 RESEARCH REVIEW

The research for this dissertation is guided by the following hypothesis:

The provision of a support service by school clerks is neither effective nor efficient because of a lack of: (a) job descriptions and duty sheets describing in detail the duties and responsibilities of school clerks; (b) proper selection procedures; (c) purposeful training and development for school clerks, (d) proper evaluation of staff and training of educators in administrative matters resulting in poor supervision of and guidance to school clerks.

1.4 RESEARCH AIMS

The aims of this research project are to:

- Ascertain whether the support service rendered by school clerks is indeed ineffective and inefficient
- Establish possible reasons for such ineffectiveness and inefficiency
- Identify the training needs of school clerks

- Develop a uniform job description and duty sheet for school clerks.

1.5 RESEARCH METHOD

The investigation will be undertaken through a study of relevant literature that includes books, journals and encyclopaedia. Relevant documents which include newspaper cuttings, press statements, papers delivered at conferences and workshops will also be studied. Structured and unstructured interviews with public school principals, school clerks as well as departmental officials in the Northern Highveld Region of the Mpumalanga Province will be conducted. It is envisaged to cover thirty schools in the region, which will include primary schools, combined schools, secondary schools and senior secondary schools. In this context, variables such as the size of the school, choice of school subjects and other structural – functional variables of the school will be taken into consideration in order to ensure that the sample is representative of the population. This is necessary to arrive at valid conclusions.

The literature study will be used mostly to describe the ideal (theoretical) practices of staff provision and utilization in public schools aimed at effective and efficient service delivery. The empirical study, by means of interviews, will mostly be used to describe the actual staff provision and utilization practices in the sample. The two sets of data will then be compared in order to arrive at findings and conclusions.

1.6 REFERENCE TECHNIQUE

The standard abridged Harvard referencing technique will be used to acknowledge sources used in the preparation of this dissertation.

1.7 DELIMITATION OF STUDY

Before 27 April 1994 the different governments in South Africa had different rules governing schools under their jurisdiction. The prevailing situation in public schools in the Northern Highveld Region of Mpumalanga Province is therefore influenced by the period prior to 1994. In order to understand the complexities that exist at the present schools under the jurisdiction of the Mpumalanga Department of Education (MDE), it is important to cover the situations which regulated these schools under the four

former departments of education of the previous regimes. These are the Department of Education and Training (DET), the Transvaal Education Department (TED), the KwaNdebele Department of Education and Culture (KDEC) and the former Bophuthatswana Department of Education and Culture (BDEC). All the above-mentioned former departments constitute what is presently the Northern Highveld Region of the Mpumalanga Department of Education. It is therefore necessary to consider the period from 1992 to 2000 for the purposes of this study.

1.8 SEQUENCE OF CHAPTERS

The research report will be comprised of six chapters. Chapter one covers the introduction to the report, the problem statement, hypothesis, research methodology, reference technique and the delimitation of the study. Chapter two will cover the creation and filling of clerical posts at schools. Chapter three will deal with the issue of training and development of personnel at school and Chapter four will cover the evaluation of school clerks. Chapter five will then cover school management and chapter six will be a summary and recommendations.

1.9 DEFINITION OF TERMS

Principal: "An educator appointed or acting as head of a school" South Africa (Republic). 1996. South African Schools Act 84 of 1996. Pretoria: Government Printer.

Educator: "Any person performing education functions at a state educational institution whose conditions of employment are regulated by the act" South Africa (Republic). 1998. Employment of Educators Act 76 of 1998. Pretoria: Government Printer.

Learner: "Any person receiving education or is obligated to receive education in an institution of learning" South Africa (Republic). 1996. South African Schools Act 84 of 1996. Pretoria: Government Printer.

Public school: "A school established or deemed to be established in terms of section 52 of Act 84 of 1996 which enrolls learners in one or more grades between grade zero and grade

twelve” South Africa (Republic), 1996. South African Schools Act 84 of 1996. Pretoria: Government Printer.

Governing body: “A governing body is a body contemplated in section 16(11) of the Act which stands in a position of trust towards the school” South Africa (Republic), 1996. South African Schools Act 84 of 1996. Pretoria: Government Printer.

Personnel evaluation: “The personnel activity by means of which the enterprise determines the extent to which an employee is performing the job effectively” (Andrews, 1998:295-296).

Job analysis: “A process of determining and reporting particular information relating to the nature of a specific job” (Byars & Rue, 1994:81).

Job description “A process of structuring work and designing the specific work activities of an individual to achieve certain organizational objectives” (Byars & Rue, 1994:81).

Orientation: “The introduction of a new employee to the organization, work unit and job” (Byars & Rue, 1994:227).

1.10 LIST OF ABBREVIATIONS

BDEC	Bophuthatswana Department of Education and Culture
BPSC	Bophuthatswana Public Service Commission
CPO	Central Personnel Office
DET	Department of Education and Training
DPSA	Department of Public Service and Administration
KDEC	KwaNdebele Department of Education and Culture
MDE	Mpumalanga Department of Education
MEC	Member of the Executive Committee
NDE	National Department of Education
PAQ	Personnel Assessment Questionnaire
PDE	Provincial Department of Education
PFMA	Public Finance Management Act
PSC	Public Service Commission
PSSC	Public Service Staff Code
PSR	Public Service Regulations
SGB	School Governing Body

SMT

School Management Team

CHAPTER 2 CREATION OF POSTS, RECRUITMENT AND SELECTION FOR APPOINTMENT

2.1 INTRODUCTION

The creation of posts in the Public Service and the subsequent filling of such posts play an important role in the delivery of services by public institutions. Such creation of such posts should be in line with the needs of the communities to be served. Appropriately qualified personnel should be employed in order to realize the objectives of each institution. It is for these reasons that job analysis and description as well as job specification should be undertaken before any post can be created.

This chapter will firstly concentrate on the theory of job creation and the filling of posts in the public sector. Secondly, it will focus on the practice of job creation and the filling of posts in public schools of the former departments of education and the present MDE.

2.2 CREATION OF POSTS - THEORY

The creation of posts in the Public Service involves job analysis and job description. For an institution to start the recruitment process for the filling of posts, appropriately qualified people must be involved in the analysis and description of the job. This should enable the institution to demarcate the units of work within which the incumbent will be able to utilize his/her physical and mental abilities effectively. Job description will also assist in ascertaining the required qualities, skills or knowledge for the execution of duties (Cloete, 1985:98).

The creation of posts in the Public Service therefore needs a confirmation that the post is necessary in order to meet the objectives of the department or institution concerned. In a case of a newly defined job, it is necessary for the job to be evaluated by qualified people to ensure that the post is placed appropriately in the hierarchy and remunerated accordingly. The executing authority also needs to ensure that sufficient funds are available for the creation of the post so that no posts are created when there is no money (Cloete, 1985:98).

The successful selection of candidates and the subsequent filling of posts in the Public Service is dependent on the analysis, description and specification of the post required. Job description and job specification consists of the collection of information, analyzing the information and the breaking down of the work into small units that can be performed by an individual. The information to be collected include the nature and the quality of the work to be done, the discretion the appointee will be allowed to use in the execution of duties as well as the knowledge, skills and experience required (Cloete, 1991:160-165).

The collection of information for creating posts also helps in identifying units of work to be allocated to individual workers, horizontally or vertically. This collection will therefore lead to the establishment of a structure of an organization with all the duties to be executed by different levels. The classification of posts also helps in the equal treatment of employees involved in the same type of work (Cloete, 1991:160-161).

According to Byars & Rue (1994: 94), job analysis can be conducted according to four methods, namely observation, interviews, questionnaires and functional job analysis. The products of job analysis are job description and job specification that helps in giving a detailed description of the job and the required skills and knowledge.

According to Kroon (1990:243), job description consists of a detailed written exposition of activities, duties and responsibilities of each post in an institution. After the job has been described, a job specification, which would indicate the qualities, skills and knowledge required for the execution of the job, must be drawn up. Job specification is therefore an indispensable auxiliary aid for the appointment of a suitable candidate for the job.

Before job description is commenced with, a decision should be taken by those who are involved in the design of positions on whether the job should be described as it should be done or as it is done. The process of describing the work to be done will facilitate determination of the responsibilities of the incumbent of the post. Job analysis which leads to job description and job specification will also help management in establishing standards of performance for the incumbent during the appraisal process (Sullivan & Decker, 1992:155-156).

Job description and specification is not only required for the appointment of suitably qualified personnel but also for the development of work procedures and methods. This information could also be used for the purpose of compensating employees, promotions as well as identifying the training needs. An organization may not be able to train an employee if the work to be done is not defined (Fisher et al., 1990).

The requirement that job analysis and description be undertaken also leads to a reduction in conflict at work. A common understanding of the duties to be executed by each individual as well as the expectations from management will be identified through the process of job analysis and job description. Clear information on what the newly appointed is expected to do will also reduce high expectations from the individual, which may lead to early dissatisfaction or early resignation if not explained timeously. Job analysis and description will also facilitate the process of orientating the new appointee in his/her sphere of operation. If the newly appointed knows exactly what is expected of him/her, that could lead to a positive image being created by the new appointee about the organization (Fisher et al., 1990).

2.3 CREATION OF POSTS IN THE DEPARTMENTS OF EDUCATION

Since the birth of the New South Africa on the 27th April 1994, job analysis and description has not been conducted until departments were required by the Public Service Regulations of 1999 (PSR 1999:12) to undertake job evaluation before posts are filled. The PSR provides for the Department of Public Service and Administration (DPSA) to establish a system to be used in the Public Service for the purpose of job evaluation. The DPSA in turn made general rules for job evaluation that should be adopted by each department with regard to job evaluation. These include:

- “Evaluation of newly defined jobs with the Equate Job Evaluation System before creating posts”.
- “Provision for the evaluation of jobs limited to vacant posts on grade 9 and higher before such posts are filled unless the post has been evaluated previously”.
- “Taking the results of job evaluation into account when determining the employee’s salary level”.
- “Evaluating or re-evaluating any existing job in its department in terms of job evaluation system”.

- “Upgrading an existing post provided:
 1. The prescribed job evaluation system indicates that the post is under graded or that the job might apply to more than one salary range.
 2. The department’s current budget and medium-term expenditure framework provides sufficient funds”.
- “Downgrading an existing post after it has been evaluated and an attempt to redesign the job to equate it with the existing grade was made. In the case of a post being downgraded, the executing authority should attempt to transfer the existing occupant of the post before the post can be down-graded” (PSR, 1999:12).

The DPSA also made provision for each department to formulate a departmental policy on job evaluation. Such a policy should address the following issues:

- (i) “The delegations where the executing authority devolve his/her authority concerning job evaluation to the incumbent of a specific post in the department”.
- (ii) “The request for job evaluation where the individual employee, employee organization and management can make submissions concerning jobs to be evaluated as well as the procedures to be followed in doing that”.
- (iii) “The identification of jobs to be evaluated and the prioritization thereof and the determination of the criteria that can be followed in the prioritization of job evaluation”.
- (iv) “The establishment of a job evaluation unit with the size, role, functions and the working procedures of the unit”.
- (v) “The establishment of the job evaluation panel by the job evaluation unit with the size and composition, the roles of the members and the function thereof”.
- (vi) “The establishment of a decision-making process, which should take final decision on upgrading or down grading of posts and how the information will be communicated to the affected people”.
- (vii) “The establishment of the decision-making process by the departmental unit that will take the final decision on upgrading or down grading posts”.
- (viii) “The establishment of the reporting procedure by the department and the role of the employee organization in the process of job evaluation and how the request and reviewal will be handled” (PSR, 1999: 12).

**JOB
EVALUATION IN THE PUBLIC SERVICE**

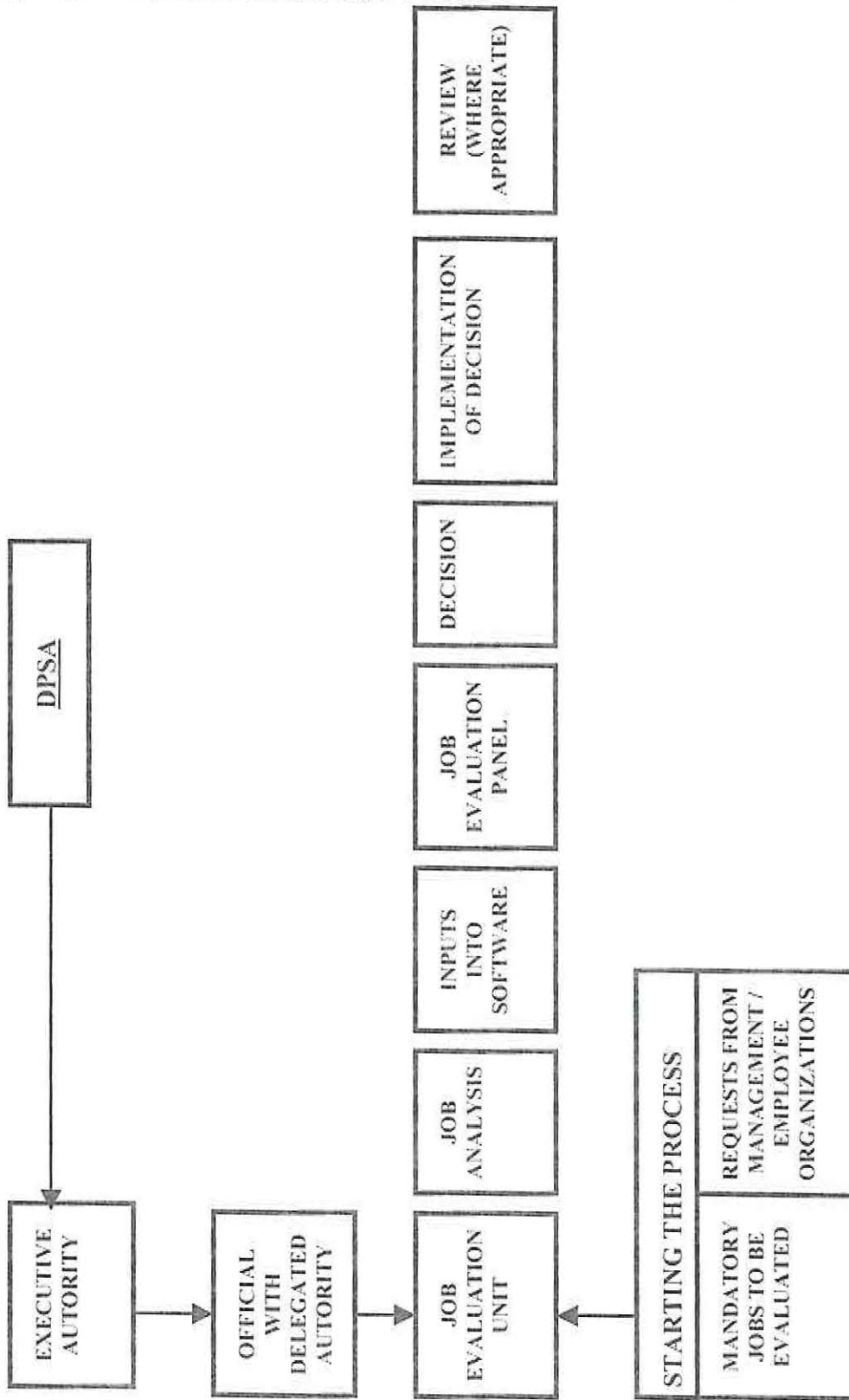


FIGURE 2. (JOB EVALUATION [DPSA] P.12)

As indicated in figure 2, the DPSA has developed a system called EQUATE. The EQUATE system has a questionnaire that consist of the following five elements:

- RESPONSIBILITY :“Refers to what the incumbent of the post will be responsible for, e.g. money, equipment or personnel
- THINKING :refers to the thinking demands and the completion of the work to be carried out by the post-holder
- COMMUNICATION :considers the level at which the jobholder will be communicating and whether he/she will have contact with members of the public
- KNOWLEDGE :considers what level of knowledge, qualifications, skills and previous experience are required of the jobholder to be able to execute his/her duties
- ENVIRONMENTAL DEMANDS :indicates the environment in which the person finds himself/herself in, i.e. how dangerous, demanding or socially disruptive it is as this may have an impact on the jobholder in the execution of his/her duties”.

It can be seen that before posts are created, job analysis and description must take place. The analysis and description of the job will ensure that the responsibilities attached to the post are outlined, the thinking demanded by the post, the nature and importance of communication, the knowledge required for the successful execution of tasks as well as the demands put on the employee by external factors are identified. It is important that before posts are created, analysis and description of the job is undertaken in terms of the EQUATE system (DPSA Manual on job evaluation, 1999:12).

Having described the practice of job evaluation prescribed by the DPSA for current government departments, the situation that prevailed prior to 1994 will be interrogated in the paragraphs to follow.

The Department of Education and Training (DET) followed a different approach with regard to the creation of posts in schools. The Regional Office created all administrative posts for area offices under its jurisdiction. The creation of posts was undertaken annually depending on the availability of funds for such a purpose. After the Area Office had been informed of the number of posts allocated, the Area Manager in consultation with the Circuit Manager and the Head of Administration at the Area Office would decide on the schools to be allocated posts. The criteria used for such allocations was the size of the school irrespective of whether it is a primary or secondary school and only one post per school was

allocated. The creation of posts at the Regional Office without a request from schools led to the allocation to schools of posts without proper job analysis, description and evaluation being undertaken (Magagula, 1998).

The fact that posts were allocated on the basis of the size of the school led to a situation where some secondary schools had no clerical personnel whilst some primary schools had such posts. The workload of a particular school, which provided for subjects that needed typing, was not taken into account when posts were allocated. This resulted in some clerical personnel being overloaded with work whilst others were under-utilized (Manyisa, 1998).

The former Transvaal Education Department (TED) had semi-autonomous schools referred to as "Model C" schools. This category of schools had more authority with regard to the day to day running of the school as compared to those schools under the former "homelands" and the DET. Posts at "Model C" schools were created and filled at the school without any direct involvement of officials from the Circuit or Regional Office. The criterion used for the creation of such clerical posts was based on the work to be executed such as financial tasks, registry functions and the general administrative work. All schools under the former TED had more than one school clerk depending on the workload at the school (Schoombee, 1998).

The creation of posts for clerical personnel at one high school, Hoerskool Ben Viljoen, is a case in point where the creation of a post was based on the workload. Every post was of a specialized nature due to the fact that the school had residential facilities to accommodate pupils from the neighbouring farming community. This situation therefore necessitated the appointment of more administrative clerks to assist in the running of the school as a whole. The TED provided funds for the creation of only three posts whilst two were created out of school funds. The creation of posts out of school funds required the approval of the School Governing Body (SGB) that acted as custodian of the school funds (Ras, 1998).

The Central Personnel Office (CPO) was responsible for the creation of posts in schools of the former KDEC. This Office was not only responsible for the staffing of the administrative personnel at schools, it was also responsible for all departments in the former KwaNdebele Government with regard to the provision of the support staff. The Head Office of the KDEC communicated with the CPO with regard to the creation of posts. This would normally be based on the submission made by the school to the

Circuit Inspector who would then forward the submission to the Departmental Head Office, to liaise with the CPO. The CPO would then create the post based on the information received and allocated a post to the school through the normal official channels. The request for the creation of posts at schools emanated from the school itself, however, no job analysis, specification or description was undertaken before posts were created (Skosana, 1998).

All schools falling under the former KDEC had clerical personnel. Secondary and senior secondary schools had a minimum of two clerks per school to a maximum of five depending on the size of the school. Lower primary and higher primary schools had a maximum of two clerical posts per school (Mahlangu, 1998).

The BDEC had no responsibility for the creation of clerical posts at schools. The Bophuthatswana Public Service Commission (BPSC) created posts on receipt of a request from the BDEC. The BDEC would have received the request from the Circuit Inspector who in turn would have received the same request from the school concerned. The posts would then be created by the BPSC and allocated to a school through the normal official channels (Tladi, 1998).

The creation and allocation of posts to schools in the former BDEC was only carried out for schools built and financed by the government. Two categories of schools existed in the former BDEC. The first category of public schools was that of schools built and financed by the Government of Bophuthatswana whilst the second category belonged to the schools built by the community itself. The first category was the one where the BPSC allocated posts whilst the second depended on the contributions made by the community to create a clerical post. It is for this reason that schools that were allocated posts were secondary schools built and financed by the BDEC. The criteria used for the creation of posts for schools was the size of the school with lower primary and higher primary schools receiving no allocation (Hakala, 1998).

From April 27 1994 to December 2000, the MDE did not create new posts for school clerks. The MDE was still awaiting the outcome of the investigation commissioned to undertake a study with regard to the creation and allocation of posts in different schools (Pienaar, 1998).

The different approaches followed by the different departments of education resulted in different procedures followed in the recruitment of school clerks as will be seen below.

2.4 RECRUITMENT - THEORY

According to Sullivan & Decker (1992:155-158), recruitment is a set of activities an organization uses to attract candidates for the job. These activities entail the identification of the needs, the determination of the fields of recruitment, the attraction of suitable candidates for the job and the correct selection process.

For successful recruitment to be realized, careful planning is necessary from those involved in the recruitment process. The Human Resource Manager normally carries out the task of recruitment. When the Human Resource Manager is informed of the availability of the post, the next step is to carefully examine the job and the enumeration of the skills, abilities and experience needed to execute the duties. The Human Resource Manager should also consider other matters related to the post such as developmental opportunities for the incumbent, geographic location as well as the payments to be made to the successful candidate (Fisher et al., 1990).

The Human Resource Manager should decide in his planning for recruitment whether the recruitment exercise would be undertaken externally or internally. In most organizations, recruitment for the entry grade is usually external. Internal recruitment is usually undertaken for posts that are higher and require management skills (Fisher et al., 1990).

After the Human Resource Manager has decided on the recruitment environment, a decision still needs to be taken on whether recruitment should be formal or informal. Formal recruitment include advertisements whilst informal recruitment is more commonly used for clerical posts and blue collar personnel. The method of recruiting informally can be implemented quickly and is by far the most commonly used for entry grades. Although this method of recruitment is less expensive, it has its drawback in that the appropriately qualified people for the job may not be appointed. Because of this drawback, it is necessary for the organization to supplement the informal method of recruitment with the formal method (Fisher et al., 1990).

The management of any agency that requires the recruitment of personnel has to realize that talent and skills together are scarce commodities. Public institutions such as schools and administrative offices need to take recruitment seriously in order to employ the most talented and qualified people to realize their mandate of educating children. This therefore requires that employment conditions be developed

which will attract the most competent and qualified candidates. Salary levels and other benefits will result in the appointment of appropriately qualified and experienced officials (Rebone, 1987:71 – 72).

According to Fisher et al. (1990) advertising is probably the most common formal method of recruitment. The aim of this recruitment exercise is to generate a pool of minimally qualified people as the target for possible appointment. For the advertisement to attract the most relevant candidates, it must contain enough information about the job, necessary qualifications, location and pay rate to ensure in advance that those who do not qualify are eliminated easily.

The greatest attraction in an advertisement appears to be the benefits offered to the prospective employee. The opportunities associated with the job, the intrinsic satisfaction to be derived from the job and the fringe benefits constitutes the greater whole. As a result of the greater concentration on the fringe benefits than any other aspect of the job, an institution must ensure that the advertisement also carries the key performance areas that are linked to the main objective of the institution. By so doing, chances of recruiting an appropriate candidate for the job will be strong as the advertisement will also carry other benefits besides the fringe benefits (Booyens, 1993:310).

As discussed in the paragraphs above, the basis for the successful employment of a suitable candidate is the recruitment of the potential employee with the necessary educational qualifications and skills. Advertising is therefore a method, which underpins human resources provisioning which is directed towards filling vacancies with appropriately qualified personnel. It is normal in the Public Service for the recruitment of highly skilled personnel such as management positions where certain skills are required to be advertised nationally. Positions that require less skilled personnel may be advertised in a relatively small geographic area to attract mostly local inhabitants (Cloete, 1985:113).

Institutions cannot hope to attract the best suitable candidate by word of mouth. The qualified candidate should be selected from a broad – based pool of applications drawn from society without regard to race, gender or ethnicity. It is therefore evident that positions must be advertised broadly enough to ensure that qualified candidates are aware of its existence and that they will all compete for the post on an equal basis (Sylvia, 1994:183-184).

Maintenance of a waiting list is a recruitment process where individuals seeking employment are required to submit their particulars. This information is kept until such time that there is a vacant post.

As soon as the vacant post is available, the selection process is done through the scrutinization of the application forms. Candidates that meet the requirements are approached and the second stage of the selection process is followed (Cloete, 1985:113).

These two recruitment methods, advertising and waiting lists were used to support each other in some of the departments as will be seen below.

2.5 RECRUITMENT IN THE DEPARTMENTS OF EDUCATION

The former DET advertised posts through circulars that were placed on notice boards at the circuit offices and other government institutions. Because of the lack of proper job descriptions, advertisements for school clerk posts were of a general nature and indicated the minimum educational qualifications and a brief description of what the new appointee was expected to do (Magagula, 1998).

The former TED on the other hand, used circulars as well as local newspapers for the advertisement of posts. Copies of the advertisement were also placed on notice boards at schools in the surrounding area and other government offices. The job description was not clearly stated in the advertisement and tended to be general, referring to secretarial work such as answering telephones, typing letters and assisting the principal in other duties that may be allocated by the superior (Schoombie, 1998).

In the present MDE, very few posts were advertised due to the moratorium that was placed on the filling of vacant posts. An institution with a dire need for an administrative position had to apply for permission from the Provincial Head Office of the MDE to fill the post. After approval had been granted, the school with the vacant post would follow the same procedure that was followed by the preceding department. This was a result of the lack of policy in the department regarding the filling of clerical posts at school (Masilela, 1998).

As indicated in the foregoing discussion, the formal recruitment process through advertisement was not used by some of the departments of education studied. The KDEC and BDEC used the informal method of recruitment as indicated below.

The majority of departments included in the study used the waiting list method of recruitment. The DET also used this method of recruitment. Individuals who were looking for employment submitted

application forms at the Area Office without indicating a specific post that they were applying for. Whenever a vacancy existed at a school, the Administrative Officer or Chief Clerk at the Area Office would peruse the stacks of applications to search for candidates that qualified for the post. Those that met the requirements were invited to the Area Office where selection took place by means of an interview (Leshabane, 1998).

The former KDEC also made use of the waiting list as a form of recruitment. Applicants submitted their application forms to the CPO even if there were no posts available. The Circuit Manager or the School Principal under whose jurisdiction the vacancy existed, would visit the CPO to check if there were suitable candidates for the posts. Officials at the CPO would assist in perusing the available applications. Preference was given to individuals residing near the school where the post existed with little regard for other requirements. If there were applicants that met the minimum required standard eight and resided near the school where the post existed, the Circuit Manager would then choose one of the applicants and the Circuit Office would issue a letter informing the person to assume duties. No interviews were conducted for the selection of the best candidate (Shika, 1998).

The former BDEC also kept application forms at the Circuit Office. The Circuit Inspector would make a submission to the Head Office about the need to create a post at a school after having received a request from the school. The Head Office of the BDEC would liaise with the BPSC on the submitted request for the creation of the posts. The Bophuthatswana Public Service Commission (BPSC) would create a post and then authorize the BDEC to allocate such a post. The Head Office would instruct the Circuit Office to proceed with the selection process. The Circuit Manager would then peruse the available applications at the Circuit Office for a suitable candidate. If a suitable candidate was found, a letter was then issued to call the said candidate to the Circuit Office. The Circuit Manager would take the person to the school where the vacancy existed to commence with his/her duties (Tladi, 1998).

As indicated above, different departments followed different approaches with regard to recruitment. The selection of candidates for employment, as will be seen in the paragraphs to follow, also differed from one department to another.

2.6 SELECTION FOR APPOINTMENT - THEORY

The selection of the most suitable candidate for a job constitutes the most important step an agent of state can take with regard to the successful provision of services. The legislature empowers institutions to render services in two ways: first, legislation gives direction to the activities of the government. Secondly, the discretion to authorize is granted to institutions to devise their own regulations when activating services. The powers that are delegated to the public institutions to make their own rules and regulations need to be checked in order to ensure that they are not detrimental to the good of the public (Cloete, 1985: 115-116).

The requirements for a successful selection process are that it should take place in a justifiable, equitable and fair manner in order to employ the appropriately qualified candidate for the job. The main objective for any institution involved in the selection process should be to try to establish the best fit between the organization and the applicant. It should enable the detection of the most suitable candidate amongst others easily. This system should therefore enable the elimination of unqualified applicants at an early stage (Burger et al., 1996).

The selection of the most suitable candidate for employment starts with the scrutinization of the application forms and ends with probation. Various methods are used to select the best candidate for the job. These range from the checking of the application forms for a suitable candidate, provisional interviews, intelligence testing, diagnostic interviews, exercising of personal judgment by the interviewer and probation (Cloete, 1985:115-116).

According to Andrews, the selection process should allow candidates to compete on an equal footing for the vacant post. This means that there should be a job description and specification to enable the selection panel to measure the applicants against the requirements of the post. The selector has to be well conversant with the contents of the job to be executed for the selection process to be successful (Andrews, 1998:108-109).

2.7 SELECTION FOR APPOINTMENT IN THE DEPARTMENTS OF EDUCATION

Candidates for employment in the DET were selected at the Area Office. The line manager, who is the principal of the school where the vacancy existed, was not involved in the early stages of the selection

process where application forms were scrutinized. The principal was, however, invited to take part in the interviewing process, which was the second step of the selection. The last step in the selection process was probation and was overseen by the school principal as a supervisor of the school clerk (Magagula, 1998).

As stated above, the former TED had semi-autonomous schools referred to as "Model C" schools. The school governing body played an active role in the creation of posts and selection of candidates for employment. Because schools under the TED were semi-autonomous, the selection process was done in two folds: there was a selection done by the principal in conjunction with the Chairperson of the SGB and the other with the Head of Administration at the school. The selection that included the chairperson of the school governing body was for applicants meant for posts established by the school out of the school funds. The selection undertaken by the School Principal and the Head of Administration was for the posts created and funded by the government. Both selection procedures were based on the suitability of the candidate as indicated in the application form. The selection process at the school was to some extent based on the requirements of the post as indicated in the advertisement (Ras, 1998).

The former KDEC and the former BDEC did not proceed with the selection process beyond the scrutiny of the application forms. This situation and the fact that the school principals in both departments were limited to making requests for posts could have resulted in the possible appointment of unsuitable candidates (Raphuti, 1998).

The MDE had its selection procedure based on the procedure that was followed by the preceding department. The schools that were part of the former DET and TED followed the procedure of conducting interviews. Schools that were previously under the former KDEC and BDEC were limited to the scrutiny of the application forms at the school and a suitable candidate taken from the rest (Massilela, 1998).

From the preceding paragraphs, it follows that interviews were conducted in the DET and TED. The theory of proper interviewing will be described in order to compare the practice in the paragraphs to follow.

2.7.1 Interviews – theory

Interviews form part of the second phase of the selection process for suitable candidates for the job. In this selection process the manager is able to have the greatest impact on the choice of the employee to be employed. During the interviewing process, the manager can establish both the potentials of the person as well as the effectiveness of the selection process itself. Interviews need solid information that is not readily available from the candidate's application forms. The interviewing process is also important in that the candidate's compatibility with the job, communication skills and the speed by which the candidate is able to answer questions can be assessed (Sylvia, 1994:189).

For the selection process to be successful, interviewers should be carefully selected. The interviewer should be someone with the necessary knowledge and qualifications and should also be trained to conduct interviews. If the interviewers are not trained properly, it could be dangerous as wrong candidates could be appointed to positions in the Public Service. It is therefore important that the interviewers should know exactly what they want to achieve with the interviews. The environment where the interviews will take place should be neat and suitable for the purpose. It should preferably be where there is little or no interruption. For the interviewer to get desired results appropriate questions should be asked and the responses recorded to ensure that the correct decision is taken based on the information available (Cloete, 1985:119-120).

According to Andrews (1998:120), the effectiveness of an interview is to some extent dependent on the competence of the interviewer. Those who are to interview candidates should be selected on their ability to make a current prediction about the future success of the candidate when employed. It is also a norm to prefer interviewers with university training for interviewing candidates. Job experience, however, is the prerequisite when it comes to the most important task of selecting the right candidate for the job. Interviewers should meet the following basic requirements to make an interview process a success: -

- *Experience of the same work as that for which the candidate is being selected
- Training and experience to assess candidates in the light of their actions
- Objectivity and an understanding of different personalities
- Insight to be able to make a sound assessment and select the right candidate
- Co-operation with advisors and other employees who are involved in the selection

process

- Skills in planning an interview and evaluating the results meaningfully
- Ability to make personal contact with the candidate and to reduce tension
- Conviction that personal interviews are necessary and important for the selection of candidates
- Control over the interview by asking questions and making observations to encourage candidates and at the same time to make meaningful summaries of the interviews
- Ability to listen attentively and adapt to different situations and candidates”(Andrews, 1998:120).

Booyens (1993:315) indicates that an interview can only be successful if the method of selection is done in a structured way and designed beforehand. The following need to be done in advance before interviews are commenced with: screening of the application forms of the short-listed candidates by a panel and the elimination of candidates who do not compare well with others by virtue of the job description and specification.

Another important aspect to be undertaken before interviews are conducted is to study the job description of the post. This is done to formulate appropriate questions by the panel of interviewers. The environment where the interviews will take place also need to be a welcoming sight to the potential employee (Booyens, 1993:315).

As indicated above, interviews constitute the most important selection tool available to the employer. These can be divided into structured, semi- structured as well as unstructured interviews.

Structured interviews are commonly used in the selection process. These interviews entail the preparation in advance of a list of questions to be asked. The interviewers in this regard do not deviate from questions listed. The responses from the candidates are also entered on a standard form that bears columns for evaluation per question asked. The questions should be listed under each key performance area as described by the job description (Andrews, 1988:116).

A combination of prepared questions and unprepared questions constitutes what is known as semi-structured interviews. During the process of interviewing, the interviewer is allowed to ask questions which are not necessarily listed but which are relevant and may emanate from the responses of the

interviewee. This implies that the direction of the interviewing process may be dictated by the answers given by the interviewee and the follow-up questions from the panel. Semi-structured interviews are more flexible as they allow the interviewer to follow the listed questions but also to search for more information based on the responses received (Andrews, 1988:116).

The opposite of structured interviews is unstructured interviews where there is little preparation involved. A list of the subjects to be covered may be prepared. However, in most cases there are no prepared questions. This type of an interview allows the interviewer more freedom to adapt the interviewing process to the required environment. It is important that in this type of interview, trained people should be conducting the interviews to ensure that a proper selection is done (Andrews, 1988:116).

2.7.2 Interviews in the departments of education

The DET and TED followed different approaches with regard to the handling of interviews. The DET used both the structured and semi-structured interviewing methods. A list of questions to be asked by the panel was prepared at the Area Office. The office in which the interviews were to take place was well prepared with the panel members informed timeously. The School Principal and the Circuit Manager of the school where the vacant post existed, took part in the interviewing process. Interviewers were allowed to add questions to those prepared and to ask follow-up questions as candidates responded. Each member of the panel kept a record of the responses given by the interviewee. The secretary would take notes as responses were given and after the candidate had been interviewed, the secretary would consolidate the scores received from each interviewer on which the final decision will be taken (Magagula, 1998).

Schools under the former TED used structured and unstructured interviewing methods to select the best candidate. Interviews in this regard were conducted at the school where the post existed. The panel of interviewers constituted of the School Principal, members of the SGB, the most senior administration official at the school, the secretary and the Deputy Principal at the school. The panel was allowed to ask questions listed or their own questions during the interviewing process. After a decision had been taken about the most suitable candidate, the information on all candidates was kept at the school and only the application forms and assumption of duty forms were sent to the Circuit Office for further processing (Ras, 1998).

Unstructured interviews were conducted in the former KDEC and BDEC schools. Such interviews were limited to the principal of the school who would ask the new appointee a few questions after the new appointee was delivered to the school by the Circuit Inspector. The interview would then take place in the School Principal's Office with no specific questions asked except personal information. These kinds of interviews served little if any purpose because it was done after the appointment (Skosana, 1998).

2.7.3 Probationary period - theory

The process of selecting the most suitable candidate for the job is extended through the use of probation. Because personnel selectors can very seldom make a correct prediction on how a recruit will perform in the actual job situation, it is necessary for the probationary period to be served when a new employee has been appointed. During this period the opportunity is created to determine the competence, disposition and loyalty of the recruit towards the institution (Andrews, 1988:105-106).

The extension of the selection process through probation is an important and final stage in the permanent appointment of an employee. The probationary period is the test period during which the manager is offered the opportunity to observe whether the candidate complies with the requirements demanded by the post or not. For the probation period to be a success, the newly appointed should be closely and objectively observed by the supervisor in order to report the actions of the employee in an honest and fair manner. When such a report is compiled, the manager should always try to be objective to ensure that important information about the employee is not concealed (Cloete, 1985:121-122).

The Public Service Act, 1984 (Act 111 of 1984), provided for appointment of clerical personnel on probation for a period of not less than twelve calendar months. The probationary period of a recruit could be extended by the number of days equal to the total vacation and other leave days taken by the officer during the period. During the probation period, quarterly reports had to be compiled by supervisors (see the South African example of such a quarterly report, Z.187, attached as annexure A). These reports formed the basis for reference in the event extension or termination of probation was necessary. The institution concerned had to make sure that the correct procedure was followed and that the three-monthly reports were completed before a higher authority could confirm permanent appointment (Andrews, 1988:125-126).

The probationary period, which is the final stage in the recruitment of personnel, was utilized by all education departments as discussed below.

2.7.4 Probationary period in the departments of education

The former DET used the probationary period as a final stage in the selection process. Quarterly reports were completed for the new appointee during this period. Courses such as communication, assessment of personnel and the filing system were conducted to train employees on probation. Confirmation of permanent appointment was however, delayed as a result of the long procedure followed. Probationary reports were sent from the school to the Circuit, to the Area Office and finally to the Regional Office where confirmation would be made (Phaleng, 1998).

The former TED, like the former DET followed the correct procedure with regard to probationary periods. Reports were written for the official on probation and there was no delay with regard to confirmation of permanent appointment. The only possible delay was caused by the number of leave days taken by the official during probation (Ras, 1998).

The former KDEC also followed the probationary procedure. However, it was not followed as stipulated by the Public Service Act (Act 111 of 1984) that quarterly reports should be written for new employees. There were no quarterly reports written in order to evaluate the performance of the employee. Employees were only confirmed permanent when they were due for promotion after serving three years. The issue of permanent appointment came only when the employee was to be promoted to a senior position (Masilela, 1998).

The former BDEC did not follow the procedure of quarterly reports. A report was written by the school principal at the end of the twelve calendar months to the Circuit Office on whether the new employee performed satisfactorily or not. In the majority of cases, all new employees were confirmed permanent after a period of a year in the employment of the department (Tladi, I.R. 1998).

During the period 1994 – 2000, only a few appointments were made by the present MDE. Posts that were filled were those that were vacant in the former departments where problems were experienced with the finalization of the appointments. The Principal wrote probationary reports that were then forwarded to the Provincial Head Office through the normal channels (Masilela, 1999).

2.8 SUMMARY

The creation of posts and the filling thereof necessitate job analysis, description and specification. The former departments of education did not give much attention to these issues. Posts were only created based on the size of the school and did not take into account the required duties. Schools with lesser numbers of pupils but more work due to the number of subject streams at the school were disadvantaged. The lack of job descriptions and specifications before the posts were created, led to selection processes that were not job related. This also made it difficult for suitable candidates to be selected as no measurement existed in terms of which the candidates could be compared. The selection process in the former DET and the TED were relatively appropriate. However, in terms of job descriptions and specifications, the process followed varied from school to school. The exclusion of the school principal as a line manager from the selection process led to a situation where the possibility of appointing unsuitable candidates was increased. This situation also led to different expectations from both the school principals and the school clerks regarding the duties of a clerk at school. Under these circumstances, namely a lack of job analysis, description and specification and a lack of proper selection procedures, it stands to reason that the support service by school clerks could not be effective and efficient.

CHAPTER 3 TRAINING AND DEVELOPMENT OF SCHOOL CLERKS

3.1 INTRODUCTION

Training and development in any institution form the basis for the effective and efficient utilization of personnel. The training of employees can be enhanced by the desire for training from the officials themselves and the assistance from the employer. Employees should also be informed as to whether they are performing to the required standard or not, and this may assist the supervisor with the determination of training needs for the officials (Cloete, 1985:152-153).

This chapter will deal with the training that was provided to employees by the former departments included in the study and the present MDE. The determination of training needs, orientation of the newly appointed, in-service training and formal training of school clerks will form part of the discussion to follow.

3.2 DETERMINING TRAINING NEEDS

The employment of officials in the public service requires a certain degree of training in the form of the prescribed required qualifications. With regard to the clerical personnel in the public service, the required qualification for appointment at entry point has been standard eight (8) until when standard ten (10) was recommended (Cloete, 1985:152-153).

The need for training of all officials cannot, however, be overemphasized. All employees, be it long serving or new appointees, need some training in order to keep abreast of changes taking place and to be in line with the latest developments. This training should be continuous and be in addition to the minimum requirements for employment (Cloete, 1985:152-153).

Training needs for clerical personnel are manifested through low productivity, slow service, poor supervision, lack of coordination, client complaints, absenteeism and low morale. These matters are dealt with below.

3.2.1 Low productivity - theory

Low productivity manifests itself when the employee does not perform to expectations. If the employee does not meet the set standards of performance, it needs to be established if this is a result of insufficient or faulty training. It is necessary to look for other causes of low productivity as well, although the first step would be to ascertain if low productivity is not a result of poor or faulty training (Andrews, 1988:136).

3.2.2 Low productivity in the departments of education

Although there was evidence of low productivity in some of the schools under the former DET, some of the schools performed better when compared to others. This situation could be ascribed to the fact that all school clerks in the former DET were trained with regard to office etiquette, communication as well as the filing system. It was to be expected that some of the schools would perform better than others due to the style of management applicable at a particular school (Shaku, 1998).

The former TED had little problems with regard to low productivity. All personnel in the clerical category were divided into personnel related matters, finance, logistics and provisioning issues. It was possible to divide the work of these officials as they all had duty sheets. At some of the schools where there was a post of a Chief Clerk such as Hoërskool Ben Viljoen, such an official was responsible for the planning and co-ordination of the duties of school clerks in consultation with the School Principal (Ras, 1998).

In the former KDEC, there were schools whose low productivity was evident whilst others performed to the required standard. Although there were no job descriptions and duty sheets in these schools, the number of clerks at the school and the management style of the principal played a role with regard to productivity. Smaller schools with more than one clerk had problems with productivity depending on the management style of the principal as a supervisor. The lack of a clear distinction of duties in

smaller schools resulted in low productivity where no responsibility was attached to a particular person. This situation was also exacerbated by the lack of proper supervision by the School Principal. Schools such as secondary and senior secondary with a large number of pupils showed some satisfactory performance as compared to primary and middle schools (Mahlangu, 1998).

Schools that formed part of the BDEC had no job descriptions or duty sheets. The level of productivity was more on the required level than their counter-parts in the former KDEC. There were no clear indications of the duties to be performed by each individual; however, they were all kept busy as they rotated in doing the work. This situation was as a result of the strict rules, which were applicable in the department. The other contributing factor had been the active involvement of the majority of principals in the day- to- day activities of the school clerk's duties (Kgomphiri, 1998).

Productivity of clerical personnel in the majority of schools in the MDE was lower than was expected. The changes that took place in 1994 raised expectations for better service from both the community and the clerical staff at schools. There were still no standards set with regard to what was expected of a school clerk. The confusion that had been taking place at schools regarding the duties of a clerk resulted in low productivity. Both the school principals and the clerks were complaining about the duties that constituted clerical work at schools. In some of the schools, the principals cited lack of typing speed from the school clerk as a reason for low productivity. The difficulty in that regard was that neither the principal nor the school clerk knew what was expected due to the lack of job descriptions and therefore duty sheets (Raphuti, 1998).

When employees produce lower volumes of work than is expected, the provision of service will be slow as will be seen in the paragraphs to follow.

3.2.3 Slow service - theory

Slow service, like low productivity, can be linked to a number of causes. Even if officials are trained, there could still be slow service due to low morale or training that is not channeled to the development of the official. Lack of information on how work has to be done may also lead to slow service as officials may use the trial and error method in carrying out their duties. This could lead to costly mistakes to the institution. The work of the employee could be sent from one office to another and backward and forward which may lead to time wastage. The result of such an action could lead to the lowering of morale of the employees (Andrews, 1998:136).

3.2.4 Slow service in the departments of education

Slow service has been prevalent in schools under the former DET. This was because school clerks in this department were appointed without proper job descriptions where it was common practice to find that service delivery such as the payment of electricity and water accounts for the schools were delayed. What was happening was that the service providers would send the accounts to school clerks who would then forward the accounts without the necessary documents as well as the confirmation by the manager that services have been rendered. These would then be returned to the school with the resultant delay in processing payment and electricity supply to the school would be discontinued. The reconnection of electricity would need a reconnection fee as a penalty (Manyisa, 1998).

The general operations of schools under the former TED were more or less on the required level. In one of the primary schools, Jullian Muller, it was indicated that job descriptions were not available, however, duty sheets were drawn and each clerk was allocated his/her duties. The payment of electricity accounts and water and refuse removals were done timeously and there was less disruption of services by the suppliers (DeLange, 1998).

Slow service manifested itself differently in the former KDEC. Electricity accounts and water and refuse removal where applicable, were paid for by the government of the former KwaNdebele. The ordering and delivery of stationary for pupils however, was not carried out timeously. Order forms were sent to schools for completion, however, due to a lack of training and knowledge of what was expected of school clerks, such forms were incorrectly completed resulting in late delivery of textbooks after teaching had started (Mahlangu, 1998).

Service rendering in the former BDEC schools seemed to have been normal as compared to KDEC and the DET. Although school clerks in the former BDEC did not have job descriptions and duty sheets, control and the allocation of duties by the principal helped in the provision of the required services (Tladi, 1998).

Because of the different policies and procedures followed by each former department with regard to service delivery, the MDE experienced problems with the schools that used to be under the former DET and KDEC. The only changes that had been implemented were the ordering of stationary and textbooks, which was done by the Provincial Head Office (Diphufa, 1998).

As alluded to above, low productivity may lead to slow service which may be caused by other factors such as supervision as will be seen below.

3.2.5 Poor supervision - theory

Whenever there is a subordinate and a manager, supervision must take place. This entails the coordination of the basic work activities of an organization. The successful coordination of activities and plans necessitate the planning of such pieces of work and the procedures to be followed in order to realize the objectives of the institution. Supervision is therefore an indispensable tool for the effective provision of services (Sullivan & Decker, 1992:180).

The formal and informal organization structure of the institution can facilitate the flow of information. Through the organogram, the official is able to know what is expected of him/her, who gives instructions and directives. The communication process depicted in the organogram will indicate as to who says what, through what channels and to whom and with what impact. It helps in giving clear communication and eliminates chances of miscommunication where everyone else gives instructions (Dlamini, 1995:74-76).

The supervisor, being the leader of a group, needs to perform specific leadership functions in order to create the will to work among subordinates. The supervisor as a leader should motivate, communicate, direct, construct work programmers and run suggestion schemes in order to succeed in the management of the institution. The leader should also ensure that personnel members are used appropriately and the provision of qualified employees takes place. The supervisor, as a leader, also needs to have some natural qualities to interpret and evaluate situations in order to direct the activities of subordinates (Cloete, 1985:211).

3.2.6 Poor supervision in the departments of education

The supervision of school clerks was a problem in some of the schools in the former DET. The majority of school principals were not trained in or informed about the duties of school clerks. Both the principal and the school clerk relied on officials from the Circuit Office for advice and clarification of issues related to the support service at school. The uncertainties of both the principal and the school clerk thus resulted in poor communication and lack of confidence in each other as a result of the supervisor that was unsure of the duties to be performed. Supervision therefore became a problem to the majority of schools due to a lack of understanding of the clerical work at school by both the School Principal and the school clerk (Bopape, 1999).

The situation with regard to schools under the former TED was more or less normal. Lines of authority and communication were clearly defined. Supervision of school clerks was the responsibility of the Head of Administration at the school who in turn reported directly to the School Principal. The fact that

the Head of Administration was also an administrative official made it easy for supervision to take place as such an individual would have been exposed to administrative functions before the promotion to Chief Clerk (Ras, 1998).

The situation in schools under the former KDEC was different from the other departments. The school principal directly supervised school clerks. The lack of knowledge and job descriptions for school clerks made supervision difficult for the majority of schools under the department. Circuit offices were also giving support and advice where necessary but poor communication resulted in mistrust and inadequate supervision from the part of the principal (Mahlangu, 1999).

Although schools under the BDEC did not have job descriptions and duty sheets, the school principals in most schools carried out their duties of supervision properly. All school clerks reported to the principal and communication was from top to bottom. Regular meetings were held with school clerks on issues related to administrative support which could have given school principals an idea of what was expected from the school clerk (Gana, 1998).

The situation regarding the MDE differed from school to school. This situation could have been caused by the fact that there had been little changes from what was practiced in the former departments. Some schools such as those that were controlled by the TED and BDEC seemed to have been coping with regard to supervision of clerical staff at school. Those that were under the former DET and KDEC seemed to experience problems with the supervision of that category of employees. The situation had thus not changed regarding supervision due to the lack of policy directives from the MDE (Masilela, 1998).

Co-ordination, as one of the functions to be undertaken by the supervisor will be discussed in the paragraphs to follow.

3.2.7 Lack of co-ordination - theory

According to Cloete (1985:206), co-ordination consists of the amassing of all activities consisting leadership. These include policy-making, communication and determining work programmes that are carried out in order to realize the goals of an institution. This therefore entails the directing of subordinates' activities to ensure that they remain in step and keep on progressing towards the achievement of the set objectives.

Co-ordination is not only limited to functional activities, but also to the structural provision to enable functional activities to take place. When the organizational structure of an institution is created, it should indicate the lines of communication. This may either be vertical or horizontal depending on the nature of the structure. The structure of the organization should be clearly defined to avoid ambiguity and communication breakdown. Communication can have a different meaning to different people depending on the environment, culture and specific group of people. It is therefore important that the sender of the message makes sure that the message is received and interpreted as intended (Dressel, 1981:37-38).

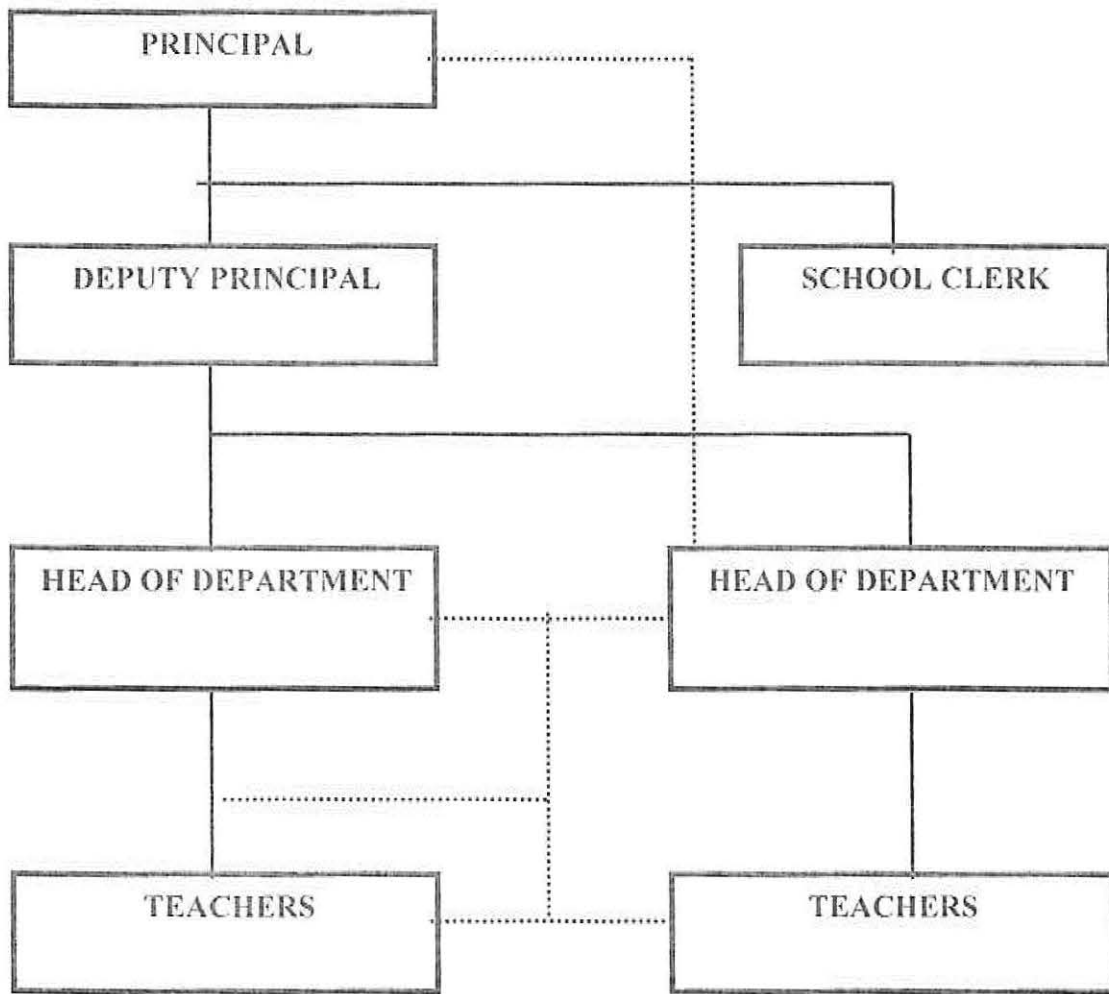
Given what goes before concerning co-ordination, the above also applies. Where there is little or no co-ordination, proper service delivery will not be possible. In addition, a lack of co-ordination indicates a training need.

3.2.8 Lack of co-ordination in the departments of education

A lack of co-ordination at some schools manifested itself as a result of a lack of structured communication channels. Although a school clerk did not form part of the teaching staff, the communication line in the DET did not take into account the school clerk. Meetings that were arranged were only for staff members on the teaching side with the clerk only required to attend SGB meetings as a secretary. The communication channels therefore extended from the teachers, to the heads of

departments, to the deputy principals and lastly to the school principals. The heads of departments as well as the deputy principals also had authority over a school clerk. In some of the schools, teachers were also giving instructions to the school clerk, which confused the activities of the clerk at school (Magagula, 1998). The communication channels within schools and in the departments of education from school level to circuit and district offices are depicted in figures 3.1-3.3.

SCHOOL ORGANOGRAM

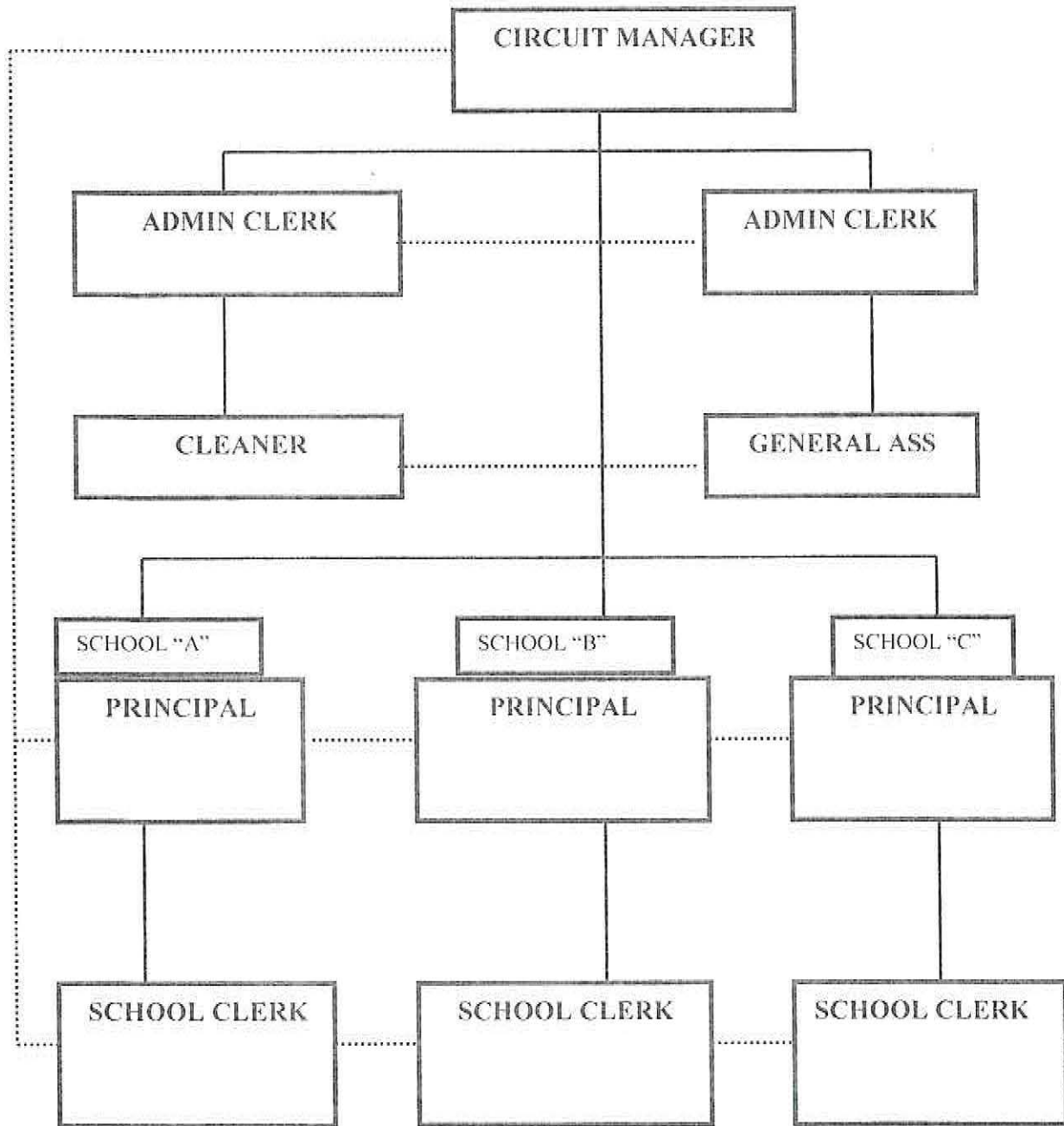


..... INFORMAL COMMUNICATION LINE

———— FORMAL COMMUNACATION LINE

FIGURE 3.1 (Magagula, 1998).

CIRCUIT ORGANOGRAM



..... INFORMAL COMMUNICATION LINE

———— FORMAL COMMUNICATION LINE

FIGURE 3. 2 (Masilela, 1998).

DISTRICT ORGANOGRAM

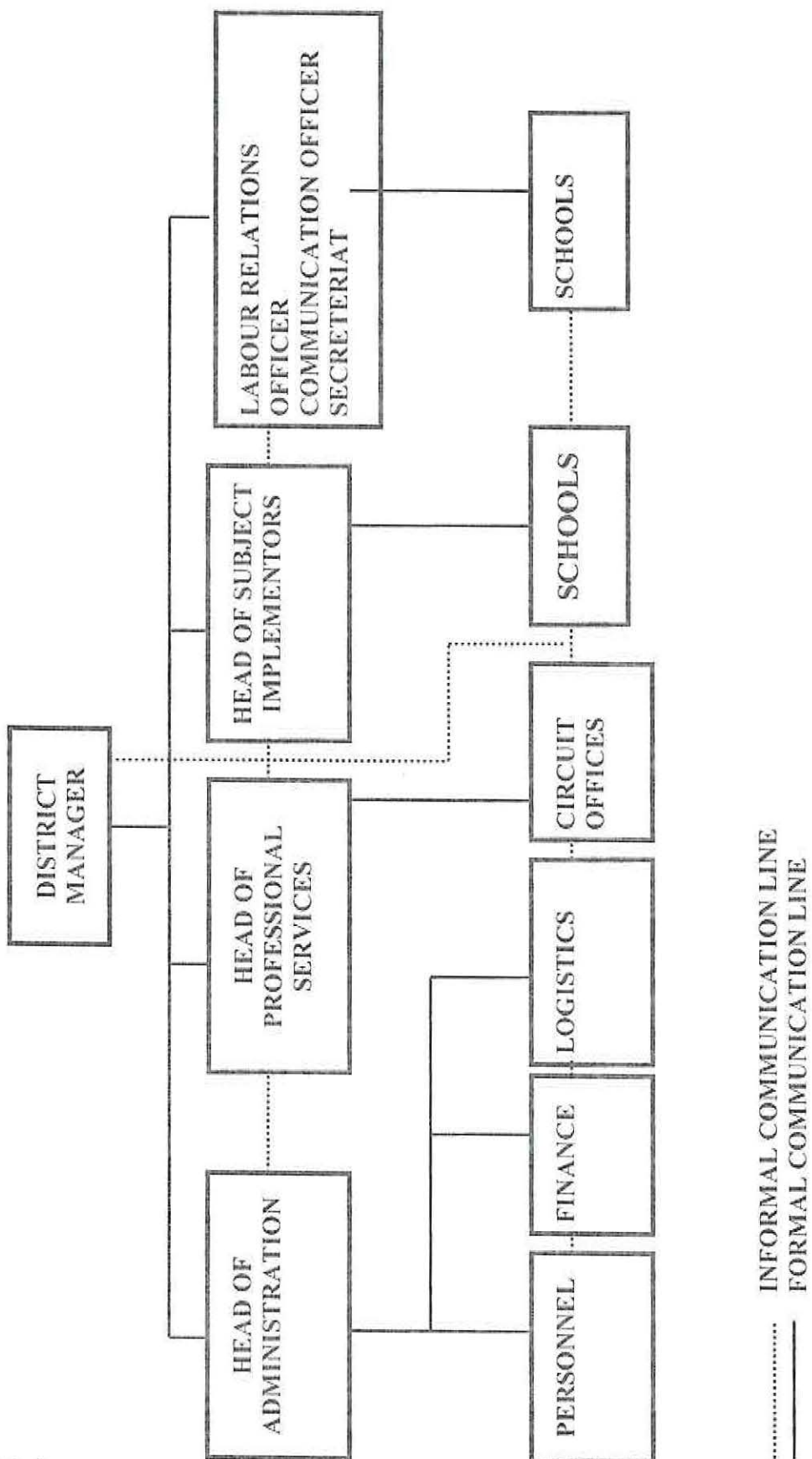


FIGURE 3. 3
(Masilela, 1998).

Figure 3.2 indicates the communication between the Circuit Office and the schools that was normally through the School Principal. All directives from the Circuit Office to the school whether administrative or not, were directed to the School Principal. This situation, although an official communication channel, posed problems to the school clerks. The school principal could relate the information incorrectly due to a lack of understanding. The situation could have been exacerbated by the lack of training of the school principals on administrative matters. In some instances the school clerk, out of frustration, would communicate directly with clerical personnel at the Circuit Office. The result of such an approach would then lead to disagreements between the school principal and the clerk, as they would receive the same instructions but interpret them differently. Communication breakdowns had therefore resulted from this type of an approach (Bopape, 1998).

The fact that the former "Model C" schools under the TED had more clerical personnel led to a situation where there was a necessity for a senior official in administration to supervise clerical personnel. Communication between the Circuit Office and the school was the same as in schools under the DET. However, the presence of a more senior official in the administration section made it easy for the administration personnel to relate and communicate with the teachers as well as the Circuit Office. Interpretation and co-ordination of functions was therefore made easy by the availability of the senior official in the administration (De Lange, 1998).

The lack of co-ordination in the former KDEC resulted from the non-availability of duty sheets for school clerks. It would be remembered that all schools in the former KDEC had more than one school clerk. The duties were not properly allocated owing to a lack of job descriptions. As a result, one school clerk would be overworked whilst the other was not busy. In one school, the situation led to a point where services could not be delivered on time because no specific duties were allocated hence nobody checked if work had been attended to (Skhosana, 1998).

Coordination of administrative activities in the former BDEC were more direct and effective. Although there were no job descriptions and duty sheets, each school clerk was allocated specific functions to be handled and the reporting line was through the School Principal to the Circuit Office. This could have

been caused by the strict nature of the control functions in the former BDEC. Circuit offices were placed at a central point and catered for many schools in the surrounding rural area (Tladi, 1998).

Some of the schools under the MDE were well coordinated whilst others were not. This was a result of a lack of policy direction from the department with regard to the functions constituting clerical work at schools. There was a lack of policy direction in the MDE that perpetuated the different procedures followed by different schools in the former departments (Phaleng, 1999).

The lack of coordination of the administrative support service at schools resulted in client complaints due to insufficient provision of service. Complaints emanated from the community as will be seen below.

3.2.9 Client complaints - theory

Public institutions are created and funded from the taxpayer's money in order to render services to the communities. For the improvement of the standard of living of the inhabitants of a country, it is necessary that the population should have a certain level of literacy. When institutions such as schools and hospitals are rendering inferior services to the communities, it may result in complaints being lodged with the controlling offices about poor services. It becomes the responsibility of every institution that provides services to the communities to train service providers so as to increase productivity (Andrews, 1988:136).

3.2.10 Client complaints in the departments of education

Teachers had been trained to educate pupils, however, school clerks had not been sufficiently trained to render administrative support services. As a result of the situation, principals in the former DET found themselves having to deal with the situation where teachers had to personally visit circuit offices to

attend to issues that affected their conditions of service. This situation resulted to complaints from the Circuit Office staff about teachers who did not follow the correct procedure when addressing their matters at the Circuit Office. On the other hand, teachers complained about delays that normally took place when documents were submitted through the school clerks to the Circuit Office (Bopape, 1998).

Complaints from the former KDEC emanated from the SGB meetings. Parents complained about the mismanagement of school funds, which was collected by the school clerk. The issue that was of concern to them was the imbalances between what was collected and what was banked. The period taken to bank the money in some cases was also highlighted as one of the problems. As a result, a number of school clerks were no longer dealing with school funds. The responsibility was given to a teacher and it also interfered with his/her duties of teaching (Mahlangu, 1999).

3.2.11 Absenteeism - theory

Absenteeism has been identified as one of the indicators of personnel dissatisfaction as well as lack of commitment. This may manifest itself in different forms such as the taking of vacation leave, sick leave or family responsibility leave. It is said that when employees are demoralized, they will start to absent themselves by making all the necessary arrangements prior to taking leave. This may continue to a situation where employees are no longer making arrangements but simply stay at home (Byars & Rue, 1994:232).

A number of factors may cause individuals to absent themselves from work. These are mainly the job content of the employee, organizational practices, the culture prevailing in a particular institution and the employee's attitudes, values and goals. If the duties of an individual employee are not challenging enough, it may lead to absenteeism. If the management of an institution does not take care of the situation, other staff members may follow with the result that the whole institution may be affected (Sullivan & Decker, 1992:373).

Absenteeism is the main cause for disciplinary action against employees. A number of factors contribute to the occurrence of absenteeism through mainly sick leave. Some of the reasons outlined which lead to absenteeism is the lack of reconciliation of the objectives of an individual with those of the institution. The attitude the employee has, the values and the norms held by the employee and the complicated procedures followed before an employee can be disciplined, may contribute to the negative attitudes held by the employees (Andrews, 1988:221-222).

3.2.12 Absenteeism in the departments of education

One common problem in the majority of the former departments of education was absenteeism. Schools under the former DET were no exception to this problem. Absenteeism in the majority of schools under the former DET seemed to have followed a certain pattern. On specific days such as when schools were in recess, absenteeism increased amongst clerical staff at schools. During the days when teachers received their salaries, school clerks also seemed affected and absented themselves even though the majority of them received their salaries at mid-month as against teachers who were paid at month-end (Magagula, 1998).

Although absenteeism had been common in schools under the former TED, the pattern was not the same as at schools under the DET. Those schools that fell under the TED and were in towns had a different pattern in absenteeism. In this regard clerical personnel absented themselves by mainly asking to go and pay accounts on the day they received their salaries. Some were either starting the day by settling accounts and arriving late or they were allowed to leave earlier in order to pay their accounts. In some of the schools, formal arrangements were made for school clerks to be allowed to pay their accounts with one or two clerks remaining and then to do the same the following day (De Lange, 1998).

Serious problems were experienced in the former KDEC with regard to absenteeism. It was common practice that on the fifteenth of each month, virtually all clerical personnel would be in town to settle accounts and to do other errands. There were no formal arrangements entered into between the

management of the school and the school clerks. Arrangements such as those in the former TED were not available and leave forms were not completed on such days. Although the standard practice was that leave forms were to be submitted, the lack of control by the supervisors seemed to have contributed to absenteeism as school clerks were not requested to submit forms immediately after resuming duties (Masilela, 1998).

The majority of the former departments experienced problems with regard to absenteeism. Schools under the former BDEC were also affected by this situation. However, it would seem the situation was much better when compared to the former KDEC and DET. The filling of leave forms for having taken leave was taken more seriously which could have resulted in arrangements being made whenever the employee was absent from work. Another aspect that could have led to the situation that was better as compared to the other schools, was that the majority of schools in the former BDEC were far away from towns and cities. Employees could only manage to attend to their private matters on weekends due to the distance and the lack of public transport in those areas (Kgomphiri, 1998).

The MDE had inherited different cultures with regard to absenteeism. The situation at schools under the former DET and KDEC seemed to have spilled over to the neighbouring schools which used to fall under the former BDEC. A lot of disruption took place on the day of remuneration in those schools, which, before, were affected minimally. The only exception to the spillover seemed to be the schools that fell under the jurisdiction of the former TED. The reasons for the spillover not to affect these schools could be the distance between the homelands schools and those in towns under the former TED. Another reason could be that the schools in this category were mostly in towns or nearer to the cities compared to the schools under the former DET, KDEC and BDEC (Mathlare, 1998).

Low production, slow service, poor supervision, lack of coordination and absenteeism which occurred in some of the departments of education led to low morale as will be seen in the discussion to follow.

3.2.13 Low morale - theory

For an employee's morale to be high, all employees, irrespective of the level of education or position, need to be respected. Respect for the dignity of an individual should be the basis on which the manager creates good working relations that may lead to improved productivity. The supervisor should understand his/her subordinates' needs to create a conducive climate for work. This, coupled with the guidance in respect of job activities that are limited to the needs of the employee, will see the lifting of morale (Knezevich, 1984:58).

Because every individual has the will to prosper in any given situation, employees who find themselves in an environment that is not challenging could end up being demoralized. Training of employees and the identification of the objectives of the institution generally lead to high morale. Training gives an individual a feeling of self-esteem among co-workers. Each individual, when joining an institution, has his own goals that may be frustrated if the employee is not trained on the job he/she is doing. This may lead to frustration, conflict and low productivity (Hanekom et al., 1987).

3.2.14 Low morale in the departments of education

A number of factors seem to have contributed to the low morale in the schools falling under the former DET and TED. The lack of proper job descriptions and duty sheets of the clerks, training that was not channeled to develop school clerks as well as communication breakdowns were all factors that could have contributed to the low morale. One aspect that became more apparent with regard to dissatisfaction from schools was complaints raised by school clerks during meetings with the circuit managers. The school clerks felt marginalized in the school environment. As a result, the majority of these officials were constantly applying for vacant posts in other departments (Leshabane, 1999).

In the former KDEC, there were also a number of aspects that led to the demotivation of school clerks. One important aspect was that the training of school clerks was not taken as seriously as those of clerks

at circuit or area offices. The KDEC made arrangements to train employees from circuits and Head Office at tertiary institutions. The lack of clear criteria for the selection of employees to be trained at institutions of higher learning led to very few school clerks managing to attend these courses. This situation also led to the majority of school clerks wanting to be transferred to the Circuit Office or Head Office (Masilela, 1998).

The changes that took place from 1994 in South Africa created expectations from the school clerks with regard to their conditions of service. It was expected that new policies would be introduced that would give clear direction to and integrate the activities of school clerks. One of the policies introduced in the new dispensation was the introduction of notch progression, which replaced the yearly automatic salary increases for all public servants. School clerks were expected to write and submit personnel evaluation reports before they could be promoted to the next notch. This policy was introduced in 1996 and implemented retrospectively from 1995. The situation did not address the frustrations experienced by school clerks. Instead, more confusion was introduced where both the School Principal and the clerk were not trained in personnel evaluation. The situation led to the majority of school clerks remaining at the same notch for years without the annual increase they used to be granted every year. Low morale resulted in increased absenteeism and slow service (Masilela, 1998).

3.3 TRAINING

Broadly speaking, training can take two forms: pre-entry training and in-service training. The former takes place before appointment while the latter takes place after appointment. For purposes of this dissertation, in-service training will be described below.

3.3.1 In-service training - theory

In-service training refers to all kinds of training that employees undergo once they have assumed duties. Such training includes induction, on-the-job training, training through distance education and meetings and refresher courses as well as full-time study at tertiary institutions. Full-time study and refresher courses are examples of off-the-job training which still is in-service training

3.3.1.1 Induction - theory

The induction of an employee plays an important role in the acquaintance of the new employee with the environment. The process of induction when handled properly could lead to the new appointee developing a positive attitude towards his/her work and colleagues. This process is particularly important for a new employee to feel welcome and to be secure. Mixing with other employees is facilitated which leads to an easy adaptation to the working environment. Information about the local community, facilities available as well as the institution's system of providing goods and services will make the new employee settle easily (Rebone, 1987:131).

According to Cloete (1985:161), every new employee is strange to the environment in which he/she finds himself/herself. It is therefore the responsibility of the supervisor to ensure that the newly appointed is made to feel needed by the institution and its people. This will mainly be evident on reception of the employee. The first few days at a work place may lead to lasting impressions on the newly appointed. If the employee who has just joined an institution is treated unfriendly, this may lead to the individual forming wrong impressions and gathering wrong information about the institution.

A good foundation for effective service delivery results from orientation of new employees. As indicated, the introduction of the official to all staff members, the materials to be used, procedures to be followed in the execution of duties as well as the explanation of rules and regulations to the new appointee will normally have an influence on the attitude the employee will have about the institution.

The reception of an employee in an institution will therefore go a long way in affecting the execution of duties either negatively or positively (Cloete, 1985:152-153).

Cloete (1985:161-162) distinguishes three stages of the induction process. The three stages are the pre-entry stage, the reporting stage as well as the continuation stage. The pre-entry stage is the stage where the appointee is informed through the letter of appointment about the job. The letter should explain in brief the service conditions applicable as well as where, when and to whom the new employee will report. The supervisor as well as other staff members should be prepared for the arrival of the new appointee.

The second stage is the reporting stage. In this stage the employee should be informed about his/her duties as well as how his duties fit-in with those of his colleagues and the institution as a whole. The attendance register, hours of work and the availability of recreation facilities must be explained to the employee during the reporting stage.

In the final stage, that is the continuation stage, the employee should be informed that the applicable legislation would be made available to him gradually. Information on available chances for promotion, grievance procedures, membership of personnel associations, as well as opportunities for studies should be explained during this stage (Cloete, 1985:161-162).

3.3.1.2 Induction in the departments of education

Orientation of new employees was undertaken in one of the "Model C" schools, Hoerskool Ben Viljoen under the former TED. The school principal prepared all that was necessary for the officials to perform their duties. The offices were well prepared in advance and the introduction done to all teachers and students. This helped the new appointees to adjust easily to the extent that in the same year an employee, on his own initiative, acquired a certificate in computer literacy. From this initiatives it

could be said that the new employee knew what was expected of him and that helped him in identifying the training needs to improve his capacity (Ras, 1998).

Although the process of induction was carried out in the former DET schools, this was in actual fact limited to the introduction of the newly appointed to the teachers as well as pupils. This therefore implies that the induction process in this regard was only limited to the pre-entry stage, the second and the final stages were not conducted. An explanation of what the post entailed was only indicated in the appointment letter whilst the procedure to be followed in the execution of duties was not explained. The new employee had to fend for him/herself on what was to be done to give support to the school community (Bopape, 1998).

In the former KDEC, there was no orientation done except the introduction of the employee to teachers and pupils during assembly time. The new employee had to make use of a chair used by pupils with no table or office. The school principal did not explain what was expected of the employee. This situation could have resulted from the non-involvement of the principal in the selection process that took place at the CPO (Matlala, 1998).

As a result of the lack of proper orientation and the explanation of what the duties of a school clerk were, a blame syndrome developed in some schools in the former KDEC. The principal blamed the clerk for inefficiency whilst the clerk had the perception that the principal had no idea of what the duties of school clerk were. The situation led to a lack of confidence on both sides with a resultant low morale on the part of the clerk (Raphuti, 1998).

The induction process in the former BDEC was also limited to the entry stage. This was also the introduction of the new appointee to the School Principal by the Circuit Inspector. The principal would then introduce the clerk to the teachers and the pupils. The continuation stage was not undertaken in the former BDEC as it happened in other departments (Gana, 1998).

During the MDE era, very few employees were employed by the MDE. The moratorium that was placed on all vacant clerical posts at schools made it difficult for any new appointments to be made. The only exception was when the school had a dire need for the school clerk. In that regard, such schools were expected to have a strong motivation on why the post had to be filled (Masilela, 1998).

3.3.1.3 On the job training - theory

On the job training is commonly used in the Public Service and entails learning from hands on experience under the supervision of experienced colleagues. This type of training enables the employee to learn different kinds of jobs with little if any expenses incurred. The supervisor together with the colleagues of an employee will usually be involved in rotational training of the new employee. The advantages of on the job training is that the employee is assisted to do his/her work with no special facilities required, and while training takes place, the employee is already becoming productive in that actual training takes place at the work station (Byars & Rue, 1994:219-220).

On the job training is important to the employee because it takes place during working hours. The immediate head makes the biggest and most lasting contribution to the development of an employee. The supervisor is in the best position to identify training needs, provide training and evaluate training results. The supervisor has the responsibility to evaluate the work situation of his/her juniors, formulate training objectives which should be in line with the goal of the institution, select the knowledge, skills and attitudes required from subordinates, draft a continuous training and development program for his subordinates as well as report the state of training to his/her head of section (Andrews, 1988:146).

The disadvantages of the on the job training are that supervisors tend to take it lightly or the supervisor himself/herself is not trained which leads to a worthless exercise. If the supervisor is himself/herself not trained, this could be dangerous in that the junior official may learn by making mistakes, which may affect the institution negatively (Andrews, 1988:146).

3.3.1.4 On the job training in the departments of education

On the job training was undertaken in the former TED. The Chief Clerk, as the Head of Administration at the school, was responsible for the training of new employees. This was possible in that the Chief Clerk was usually an official who had experience in the activities of the support service at school. New employees were therefore informed of what was expected and were assisted by the Chief Clerk who was a direct supervisor on the job that had to be done (Ras, 1998).

On the job training for schools under the former DET, KDEC, BDEC and the MDE was not carried out as was to be expected. The fact that in all the above-mentioned departments the clerk at school reported directly to the principal could have had an effect. It would be remembered that school principals are trained as teachers and not exposed to the administrative activities constituting support services. In some of the schools, principals had tried out of their own to assist school clerks with regard to their duties. In these schools, there seemed to have been few problems as compared to the majority of the schools (Raphuti, 1998).

The fact that employees that fell under the DET, KDEC, BDEC and MDE did not have supervisors who were in administration as in the TED could have led to a situation where these employees were not certain of the types of correspondence courses to register. As a result, some of the employees registered for courses through correspondence which were not relevant to their functions as will be seen below.

3.3.1.5 Distance education - theory

Correspondence courses which employees register for with formal institutions of learning serve as part of the process of continuous training. Correspondence courses are alternatives to classroom training for employees. This will normally help to develop employees while on the job, enabling them to pay the course fees with the salaries they receive from the employer. In some cases departments do give assistance to employees through the awarding of bursaries (Andrews, 1988:147).

3.3.1.6 Distance education in the departments of education

The majority of courses that the school clerks registered for in the former TED were work related. These were courses such as typing skills and computer training. Officials that registered for these courses were paying out of their own pockets to upgrade themselves (Ras, 1998).

The situation with regard to the former DET, KDEC as well as the BDEC departments was different from that of the former TED. Clerical personnel falling under these departments were found to have registered for courses that were not in line with the duties they were performing. Some of the school clerks registered for courses such as the Bachelor of Education as well as the Bachelor of Arts in Education. The majority of clerical personnel registered for these degrees through correspondence with the University of South Africa. A few of the officials under the former three departments also registered for courses with Teckinkon R.S.A. that offered relevant courses. The fact that some school clerks registered for courses in teaching could be ascribed to the lack of understanding from the side of these employees on what constituted clerical work at school. Those that registered for relevant courses were awarded bursaries whilst those who had registered for other courses not related to administration were not awarded bursaries (Masilela, 1999).

As alluded to in the previous paragraphs, supervision of school clerks was not undertaken as expected in the majority of education departments. School principals were more involved with the teaching staff than the administrative support staff. The meetings that took place with school clerks were those arranged by the Area Office in the former DET and the District or Head Office of the MDE as will be seen below.

3.3.1.7 Meetings - theory

Meetings could form part of in service training if well planned and coordinated. Such meetings could lead to useful discussions concerning problems in the delivery of services. The agenda should be

prepared on time and be adhered to by all panel members. If all the members have the opportunity to make a contribution, a rich source of information could be created from which the members who attend can learn. It is also important that the groups should be manageable to enable each individual to contribute during the proceedings (Andrews, 1988:151).

3.3.1.8 Meetings in the departments of education

Meetings were arranged for clerical personnel under the former DET. These meetings were taking place per Circuit Office arranged by the Chief Clerk at the Area Office. Such meetings were useful in that they presented a chance to clerical personnel at schools to meet with their counter-parts at the circuit and area offices. Information sharing and discussing problems experienced were attended to during the meetings. The only drawback about these meetings was that school principals were not involved. They also tended to perceive the meetings as being planned to raise issues against them by the school clerks. The majority of problems experienced by school clerks were addressed during the meetings (Magagula, 1998).

The meetings held in the present MDE were those that were arranged by the District Office or Head Office and related to the evaluation of personnel. The meetings were purely meant to train officials on how to complete personnel evaluation questionnaires. The only difference from the meetings arranged by the former DET was that these were more inclusive as principals also took part (Phasha, 1999).

Although meetings were held with some of the school clerks as indicated above, the lack of such meetings between the supervisors and the employees may have led to the non-provision of retraining and refresher courses for school clerks. Such refresher courses are part of off-the-job training.

3.3.1.9 Off-the-job training

3.3.1.9.1 Refresher courses - theory

The continuous change that takes place in all the countries of the world necessitates the changing and adaptation of the public servants to new developments. The working conditions in the Public Service are also subject to changes and it is imperative that purposeful training that will make it possible for employees to adjust advantageously to the situation should be provided. If employees are subjected to continuous refresher courses, there will be little chance of disorderly and haphazard training on the job, which may lead to frustration of the employee. It is important that employees be subjected to formal training arranged by an institution to avoid ad hoc training by fellow employees, which may lead to the non-accomplishment of the objectives of the institution (Cloete, 1985:153-154).

3.3.1.9.2 Refresher courses in the departments of education

All the former departments of education as well as the MDE provided refresher courses to clerical personnel at circuit offices and area/district offices. That situation arose because of the availability of electronic equipment such as computers at circuits and area/district offices. On the other hand, the majority of schools were in rural areas with no electricity and that could have been the reason for the lack of attention by the authorities. Although school clerks were expected by some schools to do typing for the school, such training was not provided for and individual employees had to fend for themselves to upgrade their typing skills. The school clerks under the former TED were better off as compared to those under the rest of the departments. All the former "Model C" schools had computers and the school clerks without typing background were taught to type by their colleagues. Some school clerks in the former DET and KDEC registered for computer courses on their own. However, the non-availability of equipment made it impossible for such training skills to be implemented at schools (Masilela, 1998).

Although the refresher courses were not provided to school clerks as indicated above, school clerks were able to apply for bursaries to further their studies as indicated below.

3.3.1.9.3 Full-time study - theory

The former office of the Commission for Administration administered a bursary scheme that was intended to promote formal off-the-job training of personnel in the Public Service. Even though the Commission initially administered the bursary scheme, it became necessary to transfer this responsibility to state departments in order to promote autonomy where every department administered the scheme for its own personnel (Chapman, 1993:160). This was also done in respect of the departments of education included in this study.

3.3.1.9.4 Full-time study in the departments of education

Full-time study, that is off-the-job, in-service training, had been provided for by the departments under the study. Although all the former departments provided this kind of training, the former KDEC seem to have surpassed all the other departments. The KDEC had an arrangement with these institutions of higher learning such as universities and technikons to provide training for a period of six (6) months on a full time basis followed by another six (6) months of on-the-job training (Masilela, 1999).

3.4 SUMMARY

The training and development needs of school clerks have manifested itself in the low productivity of school clerks. Slow service and absenteeism has also been an indicator of a lack of training. The obvious need for training and development has been expressed by the lack of coordination of the clerical functions at schools. This lack of coordination coupled with less training and development of supervisors resulted in complaints from the communities. Although the former DET provided in-

service training to the school clerks, progress seem to have been hindered by the lack of training of supervisors. The policy of awarding bursaries to employees after they have registered led to the majority having difficulty raising the required amount to register. Those that managed to register did so for other courses than Public Administration. As a result of the irrelevant qualifications obtained, the departments of education did not recognize them or award any special incentives. The fact that employees registered for courses that were not relevant to their duties could have been the result of the faulty induction process. The faulty induction could also have been caused by the lack of knowledge of the administrative functions by the School Principal.

From the preceding exposition it follows that all the indicators described, did indeed indicate training and development needs of school clerks. Yet, for the sample of schools as a whole, little was done to satisfy those needs. This state of affairs justifies the conclusion that school clerks could not render an effective and efficient support service inter-alia because of a lack of purposeful training. Such conclusion is supported by the fact that the needs indicated in themselves constitute evidence of an ineffective and inefficient support service.

CHAPTER 4 PERSONNEL EVALUATION

4.1 INTRODUCTION

Evaluation of personnel is a continuous process of purposeful observation of the worker in respect of whom the evaluation must be made in order to form an objective image of his or her capabilities, potential, aptitudes, preferences, limitations and weaknesses with a view to further development and utilization (Linda et al., 1990).

Rules and regulations emanating from the old Public Service Act (Act 111 of 1984), made provision for the assessment of personnel for the purpose of ensuring that employees are gainfully employed and to determine the problems experienced with regard to service delivery and possibilities of development and promotion. The aims and objectives of personnel evaluation are therefore multifaceted and should be considered in line with the purpose of the institution (Cloete, 1986:159).

This chapter will deal with the theory of personnel evaluation as well as the situation that prevailed in the different departments in this regard.

4.2 PERSONNEL EVALUATION - THEORY

Personnel evaluation in the Public Service is supposed to ensure that each employee's potential is developed to the maximum. With personnel evaluation, the supervisor is enabled to identify problem areas for employees, to place employees correctly as well as to identify training needs. Evaluation follows action while it precedes and also gives direction on the course to be taken to improve work performance (Linda et al., 1990).

According to Cloete (1986:159), evaluation of personnel serves more than one purpose. Personnel evaluation should be undertaken for purposes of special or routine salary adjustments, reassignments, training as well as the dismissal of an employee who is not performing to the required standards. Evaluation should be carried out with objectivity in order to realize the stated objectives. For the successful implementation of the evaluation system and to ensure that the evaluation process is as objective as possible, it is important that both the supervisor and the official concerned should be

trained in order to understand and have a common understanding of the process of personnel evaluation.

Training of the manager of an institution with regard to the evaluation of personnel must be in line with the requirements of the job concerned. This means that job analysis and description which will lead to job specification, should be put in place. The supervisor should be able to link the requirements of the post with the performance of an individual in order to form an objective assessment of the performance of the employee (Sullivan & Decker, 1992:279).

The purpose of job evaluation as explained above is further extended by the assessment of an employee not only for the present job but also for the potential development of the official. According to Burger et al. (1996), proper personnel evaluation serves the following purposes.

-“Employee performance is affected as the evaluation assist in generating and maintaining satisfactory performance in the present job”.

-“Employee development is served as needs and opportunities for growth are highlighted”.

-“Evaluation assists as a guide to job changes by providing bases for decisions affecting promotions, transfers as well as discharges”.

-“Wage and salary determination are influenced by personnel evaluation”.

-“Personnel programmes are validated through personnel evaluation by, for example, comparing the evaluation of the prospective employee during selection with the performance on the job”.

Training and development of personnel necessitate the continuous observation of the employee at work. Because employees are evaluated to ensure that they are performing to the required level and for possible promotions, it is important that past and potential conduct of an employee be evaluated as will be seen below.

Personnel evaluation has been implemented as a result of the need to evaluate the performance of employees in relation to the objectives of the institution. All personnel on the same level should be

evaluated with the same instrument to avoid subjectivity. To ensure that personnel evaluation serves its purpose, the employee to be assessed, his/her supervisor, the Head of the Office as well as the moderating committee and the Head of Department are involved.

The aim of personnel evaluation is to determine the knowledge, skill and attitude of an employee for possible promotion or merit awarding. The employee therefore has to play an important role in informing his/her supervisor about his/her performance. The involvement of the assessed is thus indispensable to the successful implementation of the evaluation system (Andrews, 1988:297).

The supervisor is the closest senior official to the assessed and should be involved in the assessment of his/her subordinates. The supervisor has to evaluate the performance of the employee against the set standards which have been agreed upon with the subordinate. The supervisor should write quarterly reports about the employee which will in-turn form the annual report for possible promotion of the employee. After the supervisor has assessed the employee and allocated the marks, the report should first be discussed with the employee before submission to the Head of the Office for his/her recommendations (Andrews, 1988:298).

According to Andrews (1988:299), the evaluation committee comprises of the chairperson, a vice chairperson, a secretary, a representative of the Commission for Administration and a representative of the personnel association as well as the leaders of the regional merit committees. The evaluation committee considers the reports submitted and allocate marks which may agree or disagree with what the supervisor has allocated. This committee would also take a decision on whether the employee is promotable or not. After all the factors have been considered, a list of employees evaluated is drawn by the secretary of the committee and submitted to the Head of the Department for a final decision.

After the evaluation committee has submitted its recommendations to the Head of the Department, the Head of Department can accept or reject the findings of the committee. If the Head of Department rejects the recommendations, the committee may be requested to re-visit the cases that have been rejected. However, if the Head of Department agrees with the recommendations such will come into force and the personnel section would inform the employee concerned accordingly (Andrews, 1988:299-300).

4.3 PERSONNEL EVALUATION IN THE DEPARTMENTS OF EDUCATION

The evaluation of personnel in the former DET and TED was carried-out in terms of the prescripts. Employees in schools under these departments wrote assessment reports on an annual basis. The supervisors, which were school principals were involved in the evaluation of employees. After the employee had written and submitted the report, the supervisor together with the employee concerned would discuss the report before it was submitted to the Control Officer for further handling. The control officer on the other hand would also consider the submitted report and make his/her comments before submitting to the evaluation committee. The evaluation committee would arrange a meeting where the recommendations would be made and forwarded to the Head Office for a final decision (Magagula, 1998).

School principals in schools that fell under the former KDEC and BDEC were responsible for the evaluation of clerical personnel at school. The school clerks were not involved in the writing of the reports. The school principal would write a report about the employee and submit to the Circuit Office for submission to the Head Office. The Head Office would implement the recommendations of the principal and the employee would be promoted (Masilela, 1998).

School clerks in the MDE have been subjected to the personnel evaluation. School clerks were expected to write reports dating back to 1996 when the system was introduced. The reports, with enough incidentations were to be submitted to the principal for discussion with the employee concerned. After the report has been discussed, the school principal would then forward such a report to the Circuit Manager who is the member of the District Evaluation Committee. The District Evaluation Committee will allocate marks and make recommendations to the Provincial Head Office for a final decision (Mahlangu, 1999).

Irrespective of whether employees are evaluated for promotion or not, the frequency at which employees are appraised plays an important role in ensuring that employees' performance is continuously observed to identify weaknesses or strengths in an employee. Not all departments included in the study followed the process of personnel evaluation in respect of frequent appraisals as will be seen below.

4.4 FREQUENCY OF APPRAISAL - THEORY

The frequency of the evaluation of personnel to be carried out is based on the results desired by the management of an institution. If the aim is to use personnel evaluation for the purpose of planning personnel development, then evaluation must take place when management finds it necessary and thus cannot be limited to certain periods. In other cases, evaluation may be done in order to take decisions concerning the permanent appointment of an employee who is still on probation or even to evaluate the abilities of an individual following changes in the working environment (Andrews, 1988:301).

The supervisor's monthly reports are done in order to establish the quality of work of subordinates. In this regard all the positive as well as negative aspects of the work carried out are reported. The monthly reports of the supervisor are not written to reward an employee for good work but only to ensure that the employee is operating as expected. These reports can, however, be used to compile the quarterly reports which may in turn be combined to form an annual report that can be used for the purpose of promotion and granting a merit award (Andrews, 1988:303).

The supervisor's monthly reports that were combined to form the quarterly reports and finally the annual report could also be used for the purpose of granting an employee a merit award. Annual merit reports were written for employees who were considered to have performed exceptionally well in their duties. Such employees should have been in the post for a period of not less than twelve calendar months. The supervisor nominates the employee for a merit award in consultation with the relevant official for a merit report. Such a report should consist of four elements, which are knowledge, insight, performance/production and interpersonal relations and leadership (Cloete, 1985:80).

The continuous assessment of personnel by the supervisor is important to ensure effective and efficient utilization of personnel. The supervisor should therefore use the supervisor's monthly reports to form quarterly reports. The quarterly reports will in-turn constitute the annual report on which the employee would be assessed for possible promotion (Andrews, 1988:303).

4.5 FREQUENCY OF APPRAISAL IN THE DEPARTMENTS OF EDUCATION

Quarterly reports were written for school clerks who were attached to schools under the former DET and TED. The reports were written for employees who have been in the service for a period of less than

twelve calendar months. Quarterly reports were written to ascertain whether clerks on probation were correctly placed and to check if they qualified for permanent appointments. Four reports were submitted in order to confirm the permanent appointments. If there were some dissatisfaction from the reporting officer about the new employee, the probationary period was extended by a period not exceeding twelve calendar months (DeLange, 1998).

The former KDEC as well as the BDEC did not follow the procedure of writing quarterly reports. Although the schools under the former KDEC were using the same Public Service Act (Act 111 of 1984), confirmation of permanent appointment upon expiration of the probationary period for school clerks was done after an employee had completed a year in service without compilation of quarterly reports. The School Principal was only required to write a report to the Circuit Office, which would then be sent to the Head Office where a confirmation letter for permanent appointment would be issued (Mahlangu, 1999).

The regulations which were applied in the former BDEC regarding school clerks were those in terms of the Bophuthatswana Public Service Act 1972 (Act 4 of 1972). The Bophuthatswana Public Service Regulations (BPSR) made provisions for the writing of quarterly reports by the managers of new employees, however, such rules were not adhered to as only the principal's report was used to confirm permanent appointment. In some cases permanent appointment was confirmed when the employee applied for a state guarantee to buy a house on loan from the banking institutions (Kgomphiri, 1998).

Supervisor's monthly reports were not compiled for school clerks in the former DET and TED. Only the quarterly reports that were ultimately used to compile an annual report were written. This situation could have resulted because of the lack of incentives attached to this kind of a report as it was only meant for the immediate recording of what was observed by the supervisor as against the annual reports which could also be used for promotion purposes (Phaleng, 1998).

The KDEC and BDEC did not make use of the monthly reports or quarterly reports. This situation was created by the fact that only the supervisor's report was needed for the promotion of employees. These reports were only written when the employee had completed a period of three years in the employment of the department concerned (Masilela, 1999).

During the period 1994-2000, no monthly reports were prepared for school clerks in the MDE. That situation could have been the result of the lack of policy direction with regard to different schools that used different methods in the preceding departments. As a result of the lack of monthly reports, no quarterly or annual reports were written except for the employees who were evaluated retrospectively from 1995 (Raphuti, 1998).

As indicated above, junior staff members write out of three factors. For a merit award to be awarded, an employee should obtain 33-35 points for category "B" and 36-40 for category "A". Supervisors write out of four factors and such an official must get 50-53 points for category "B" and 54-60 points for category "A". In both cases category "A" implies the payment of 18% of the lowest salary scale of the official. Category "B" constitute 10% of the lowest salary scale of the official (See the South African example of a merit award form attached as annexure B) (Manual on Personnel Evaluation, 1998).

Although the issue of merit awards was known to some of the school clerks in the former departments and the MDE, it was never applied at schools. There were no specific reasons given as to why it could not be used at schools but only at circuits and area offices (Magagula, 1998).

Merit awards reports are a culmination of the continuous observation of the employee and the writing of monthly reports on the activities of the employee as will be seen below

4.6 ASSESSMENT OF TRAITS OR PERFORMANCE - THEORY

According to Cloete (1985:141), evaluation of personnel in the Public Service is based more on traits than on performance. Traits such as adaptability, tact, resourcefulness and courteousness seem to be emphasized more than the actual performance in the job. Employers need to establish a clear picture of the employee's actual and potential performance standard and not only characteristics such as those mentioned. Supervisors need to take care not to evaluate the above-mentioned traits and characteristics at the expense of the actual performance of the employee.

4.7 ASSESSMENT OF TRAITS OR PERFORMANCE IN THE DEPARTMENTS OF EDUCATION

The former DET schools seemed to have been affected by the assessment of traits rather than the actual performance of the employee. This was evident from the remarks made by the school principals as reasons for not recommending promotions. In the majority of cases, attributes such as the behavior of the clerk and the attitudes were given as reasons for not recommending the employee for promotion (Leshabane, 1998).

The clear division of work in the former TED seemed to have made it possible for the assessment of personnel to take place. As indicated in the previous chapter, schools under the former TED had duty sheets but no formal job descriptions. The availability of duty sheets therefore made it possible for the principal to carry out personnel evaluation and to comment on the performance of the employee (DeLange, 1998).

The former KDEC as well as the former BDEC did not use the PAQ system for evaluation of personnel. Reports were only written for newly appointed employees to confirm permanent appointment or when the employee was due for promotion. It is thus clear that the evaluation conducted by the principal could not indicate whether the assessment was based on performance or on traits (Raphuti, 1998).

The PAQ was introduced in 1996 to all schools falling under the MDE. Problems were experienced with regard to the implementation of the system in the schools that used to be under the former KDEC and BDEC. The two former departments were not using the system to assess the performance of the employees. The ratings that were in most instances based on traits were more evident in the schools that used to be administered by these departments. This situation could also have been exacerbated by the lack of training given to the school principals and the school clerks in personnel evaluation (Mahlangu, 1998).

The active involvement of both the assessed and the assessor may help in eliminating some of the problems experienced in personnel evaluation such as the assessment of traits or performance. The following paragraphs will outline the role of the assessed in personnel evaluation.

4.8 PARTICIPATION BY PERSONNEL IN EVALUATION - THEORY

For the evaluation process to be carried out successfully, it is imperative that both the supervisor and the employee take an active part in the assessment of the employee. Because the supervisor has the closest contact with the official to be assessed, he/she is in the best position to evaluate the work of his/her subordinate, which should be related to the objectives of the institution. On the other hand, it is the responsibility of the individual to bring his knowledge, skill and attitude to the attention of the supervisor (Andrews, 1988:297-298).

4.9 PARTICIPATION BY PERSONNEL IN EVALUATION IN THE DEPARTMENTS OF EDUCATION

School clerks in the former DET were trained in personnel evaluation. These employees were able to write their own annual assessment reports without the assistance of the supervisor. School principals, however, were not trained in personnel assessment which hampered the active involvement of both the employee and the supervisor in personnel assessment. The majority of principals only endorsed what the school clerk had written (Magagula, 1998).

The availability of the Chief Administration Clerk in some of the schools under the former TED made it possible for the employees to take an active role in personnel assessments. The Chief Clerk was the immediate supervisor of the school clerks and was thus responsible for the assessment of these employees. Communication between the Chief Clerk and the school clerks was made simple as compared to where the direct supervisor was a principal. It was therefore easy to get the active participation of school clerks in personnel assessment (DeLange, 1998).

The former KDEC and BDEC schools did not undertake personnel assessment as was done in the DET and TED. Supervisors were only expected to write reports when the employee was due for promotion after a period of three years in service. School clerks could therefore not take part in the assessment that was done by the supervisor (Tladi, 1999).

Although some of the school clerks participated in personnel evaluation, problems were still experienced in all the departments as will be seen in the paragraphs to follow.

4.10 PROBLEMS IN PERSONNEL EVALUATION

4.10.1 Appraiser ability - theory

The ability of the supervisor to evaluate his/her subordinates plays an important role in the process of personnel evaluation. Supervisors should be able to observe the work that is done by the employee as well as to measure the performance against the set standards. It is important for the supervisor to understand the forms to be completed and the applicable terms used in the process of evaluation. Terms such as “ adaptability” may be misleading if not correctly interpreted by the appraiser. It is thus important that the appraiser must be trained to implement the evaluation system successfully (Sullivan & Decker, 1992:360).

According to Cloete (1985:145), supervisors who are required to undertake performance appraisal should receive continuous training. The supervisors should also be trained not to use the assessment of personnel negatively by using personnel evaluation as a tool to punish those that are under performing. They should also be informed not to be too strict or too lenient when assessing subordinates. Negative aspects that are discovered during the evaluation process should be turned into positive contributors towards the attainment of the objectives of the institution.

Personnel evaluation is a two-way process where both the supervisor and the employee benefit. The employer benefits by identifying training needs, correct placement of the individual and ensuring that the objectives of the institution are realized. On the other hand, the employee benefits by being recognized for effectiveness and efficiency through incentives such as promotions. The employee is also enabled to see how much he/she performs as against the set standards. This situation, when handled carefully, could result in both the supervisor and the subordinate benefiting with the resultant achievement of the objectives of the institution (Cloete, 1985:145).

4.10.2 Appraiser ability in the departments of education

The ability of the appraiser in the former DET differed from school to school. Although school principals were not trained in personnel evaluation, some of the principals had a working knowledge of the requirements of personnel evaluation. This seemed to have emanated from schools where there was better communication between the principal and the school clerk. The perception of the principal with

regard to personnel evaluation also played a role in the successful implementation of the system. The schools where the principal perceived personnel evaluation as a problem and endorsed whatever the school clerk had written led to problems as the moderating body would reject the recommendations made (Magagula, 1998).

Schools in the former TED where the immediate supervisor was the Chief Clerk had lesser problems as compared to other schools. The situation where the School Principal was a direct supervisor, led to problems being experienced that were normally referred to a higher office for assistance. The attitude of the supervisors also seemed to have contributed to the lessening of problems because the Regional Office would be contacted in case there were problems (Ras, 1998).

The schools in the former KDEC and BDEC did not follow the system of personnel evaluation by using the PAQ. The ability of the principal to appraise could therefore not be established as only the report of the principal was written without the involvement of the school clerk. The elements that constituted the personnel evaluation report were not taken into account when these reports were written (Moeketsi, 1998).

The situation with regard to the MDE has been different because of the different backgrounds of the schools under that department. The workshops arranged for both school clerks and school principals during 1998 assisted some of the principals whilst others were still experiencing problems. Those principals who were under the former DET where school clerks were trained in personnel evaluation had less problems compared to those that fell under the former KDEC and BDEC (Masilela, 1998).

4.10.3 Leniency error - theory

Leniency error takes place when a manager or supervisor over-rates the subordinate. This is usually done by supervisors who would like to be popular with staff members or by those who do not understand the process. In most instances this takes place where all those who are appraised are allowed above average marks irrespective of the performance of the employee. Leniency error has negative results for both the institution and the employees themselves. When an institution has a manager that applies leniency, the performance standards of the officials may not be realized with the resultant demotivation of those who are hardworking since everybody will obviously benefit from the incentives (Sullivan & Decker, 1992:358-359).

4.10.4 Leniency error in the departments of education

Leniency error in the former DET was not prevalent. School clerks were able to write assessment reports on their own and the majority of school principals were conversant with what was normally written. More objective assessment was thus possible as both the school principal and the school clerk were involved (Leshabane, 1998).

With regard to the former TED, the possibility of a leniency error was lesser as compared to the situation in some of the schools in other former departments. The Chief Clerk, as the immediate supervisor of the school clerk was responsible for the assessment of the school clerks. Chief clerks were trained in personnel assessment and there was little chance of such errors taking place (DeLange, 1998).

The possibility of the leniency error could not be established with regard to the former KDEC and BDEC as a result of the lack of implementation of the PAQ system in their schools. It could happen that there was leniency in the report written by supervisor. On the other hand it could be that there was no leniency. The difficulty in not following the PAQ system was that the moderating body was not available to check if all had been done in terms of the regulations (Raphuti, 1998).

The dawn of the new South Africa led to the implementation of the uniform personnel evaluation system. All schools under the MDE were expected to evaluate school clerks using the PAQ system that was not used by some of the schools under the former KDEC and BDEC. As a result of insufficient training of the school principals in personnel evaluation, some of the principals were subjected to the leniency error. Those principals that applied the leniency error rated all their school clerks on the same level without regard to the actual performance of work (Mahlangu, 1998).

The continuous observation of an employee plays an important role with regard to personnel evaluation. Through the purposeful observation of the employee, the supervisor is able to make an objective image of the performance of the employee. It would not be possible for the supervisor to indulge in leniency error as the actual situation shall have been observed. The lack of frequency of appraisal as a result of lack of continuous assessment may result in a leniency error as indicated above. However, the frequency with which employees are assessed may eliminate such chances as will be seen below.

4.10.5 Frequency of appraisal - theory

Because the evaluation of personnel is used for more than one purpose, it is difficult to attach a certain period without establishing the reasons for such evaluations. Evaluation for the purpose of confirming permanent appointment may take place quarterly while that of determining the productivity of an employee may take place once in every twelve months. It is evaluation for the purpose of promotion that is creating problems to personnel. If evaluation is taking place only once in a year, those to be appraised may only start working seriously towards the evaluation period. In this regard, officials who have been constantly performing above average all year round will be disadvantaged if those who starts towards the appraisal period are given undue recognition. Another negative aspect is that evaluation should assist in identifying mistakes from the employees as they perform their duties. When evaluation is undertaken only once towards the end of the financial year, all the mistakes shall have been committed without any remedial measures taken (Andrews, 1998:301-302).

4.10.6 Frequency of appraisal in the departments of education

The former DET and TED appraised their employees more frequently. Although the monthly supervisor's reports were not written, quarterly reports and annual assessment reports were written for the school clerks. The advantages in this regard were that the employees were always expected to perform and to keep records of what they were doing. It was therefore easy for the supervisor to reconcile what he/she had with what the employee had indicated in the report (Magagula, 1998).

Only supervisor's reports were written for school clerks in the former KDEC and BDEC. These reports were only written when the employee had three years of service and was due for promotion (Mahlangu, 1998).

The frequency of appraisal was not an issue in the MDE. That situation was the result of the promotion backlog that was inherited from the former departments of education. The only assessment reports were those of the employees that were due for promotion and were assessed retrospectively from 1995 (Kajeni, 1999).

The continuous observation of an employee necessitates a frequent appraisal in order to keep abreast of the functioning of the employee. The lack of such frequent appraisal as a result of the lack of continuous observation may lead to supervisors making the halo error as will be seen below.

4.10.7 Halo error - theory

The halo error usually takes place when the supervisor has a mental predisposition that may come from the behaviour of an employee. This predisposition may either be positive or negative and can therefore influence the decision of the supervisor during the assessment. If the employee is seen to be behaving well, chances are that the employee would be rated favourably. The weaknesses that need to be addressed by the supervisor may be overlooked. If the supervisor has a negative predisposition about the employee, such an employee may be rated low without taking into account the actual performance of the individual (Andrews, 1988:312-313).

4.10.8 Halo error in the departments of education

The halo error was prevalent in the former DET and TED where the system of personnel evaluation was carried out. Although in some of the schools the situation was normal in that supervisors were more objective, in some of the cases reported to the area offices it was indicated that some of the employees were insubordinate, lacked discipline and were not punctual when coming to work. These allegations were therefore causing problems when the actual evaluation of the employee was done (Leshabane, 1998).

The halo error also was prevalent in the MDE. The situation could have arisen because of the fact that the majority of schools were those that fell under the former KDEC and BDEC. Those departments only used the supervisor's report for the purpose of promoting the employee and therefore were more subjective than objective. The same situation as in the other departments was still prevailing in the MDE (Masilela, 1999).

The application of some of the factors such as the leniency error and halo error could lead to ambiguous evaluation standards as will be seen in the next paragraphs.

4.10.9 Clarity of evaluation standards - theory

The supervisor must be well conversant with the terms used in personnel evaluation. It is imperative that the evaluation forms to be completed as well as the meaning and interpretation thereof is understood. Terms such as good, satisfactorily and exceptional should be understood when marks are allocated which correspond with the meaning given (Anderws, 1988:312).

4.10.10 Clarity of evaluation standards in the departments of education

The Personnel Assessment Questionnaire (PAQ) indicates the different categories under which employees are to be classified. The classification also indicates the rating at which the official qualifies for promotion (See the South African example of the PAQ attached as annexure C). The ratings in the PAQ are as follows:

- 0-40%: not at all a candidate for promotion
- 40-55%: not yet ready for promotion
- 60-70%: promotable in-turn
- 75-80%: promotable out of turn
- 85-100%: preferentially promotable

Each individual supervisor may have his/her own interpretations on what promotability and non-promotability entail. The tendency with most supervisors is that their officials are rated promotable in-turn, i.e. between 60-70%. By placing subordinates in that bracket, supervisors avoid giving reasons for low ratings that will also require an explanation of the steps taken by the supervisor in addressing the problems. On the other hand, probably because of a lack of productivity on the part of some school clerks, principals seemed to avoid rating officials preferentially promotable i.e 85%, as that would have also required strong motivation. As a result of the uncertainty of the supervisor, the assessing committee would reduce the marks allocated because of a lack of supporting incidentations. The changing of the scores thus led to the changing of the recommendations from promotable to not promotable with the resultant demotivation of the individual concerned (Kajeni, C.J.A. 1998).

Although the use of the PAQ system was applicable to both the DET and TED, the ambiguity with regard to the application of the set standards was more evident in the MDE. The majority of supervisors rated most of their employees to be promotable in-turn that is between 60-70%. By placing

subordinates in that bracket, supervisors were placing themselves in a position where they would not be blamed by either the subordinates or the moderating committee. Cases where the supervisor had rated the employee preferentially promotable were seldom used as that would have also necessitated an explanation from the supervisor. The standards used were thus confusing to the supervisors with the resultant negative influence on both the supervisor and the subordinate (Masilela, 1998).

The problems experienced with ambiguous standards also led to written comments problems. Where the supervisor had scored the employee high, there would be problems with regard to the comments as that may not tally with the marks allocated to justify the decision. Written comments problems will be discussed in the paragraphs to follow.

4.10.11 Written comments problem - theory

The supervisor must summarize the work of the subordinate by making comments that are based on the report. The comments must avoid generalization and indicate whether the employee is performing satisfactory or not. Each incident should be judged in relation to the work done and the comments be in line with what has been said in the report (Andrews, 1988:305).

4.10.12 Written comments problem in the departments of education

The PAQ makes provision for the head of the office to comment in the spaces provided in the assessment form. If the Head of the Office concurred with what the employee has indicated, the reasons for supporting the employee are thus provided by the manager. If the supervisor as the Head of the institution disagrees with what the employee has provided, such disagreement should still be provided in the space allocated. Any adverse remarks by the supervisor must be brought to the attention of the assessed. The moderating body would either endorse or disregard what the supervisor has written and will give reasons for doing so to the official delegated with final approval of the recommendations (Manual on Personnel Evaluation, 1998:29).

As indicated in the foregoing paragraphs, the continuous observation of the employee by the supervisor serves two purposes. The first is to ensure that employees are gainfully employed and the second is to give credit to those employees who are hardworking. The writing of the supervisor's monthly reports,

the quarterly reports as well as the completion of the PAQ forms at the end of the year may lead to the promotion of the employee as will be seen below.

4.11 PROMOTIONS - THEORY

Promotion in the Public Service is normally provided for by the development of existing staff in order to take higher positions in the institution. This state of affairs resulted from the practice of filling entry-level posts with recruits from outside the Public Service and higher posts through promotion. It is incumbent upon employers to ensure that employees to be promoted to higher positions are trained. This training could take the form of awarding bursaries, scholarships or taking on officials to travel abroad for study and research purposes (Cloete, 1985:165-166).

The promotion of personnel needs to be done on merit. Any institution that wants to satisfy a need by providing goods and services should make sufficient provision for the successful promotion of its personnel to take place. Because promotion means that an individual is placed in a more responsible position, it is important that the issue of qualifications should also be taken into account when promoting employees (Andrews, 1988:19-20).

According to Tappen (1983:67-68), first line managers should carefully consider the granting of rewards in the form of promotion to juniors. The supervisor should also ensure that the activities undertaken by the employee to be promoted are in line with the main objectives of the institution and that the rewards are as a result of their actions in attaining the set objectives. If subordinates feel that the rewarding of some officials through promotion is not fairly and objectively done, it may discourage those officials who are hard working and may lead to resentment from such officials.

Another aspect that is important when consideration is given towards promoting staff is the frequency with which it takes place. If officials are promoted one after the other or the same officials are promoted immediately without spending a certain period in a particular job, that may lead to a situation where officials are given more challenging jobs without gaining enough experience, which may lead to failure. On the other hand, if promotion is slower in an institution, it may have long term benefits whereby the officer will be matured in a position and will benefit the institution in the longer term. Slow but more predictable promotion allows sufficient time to make a good evaluation of the performance, strengths and weakness of the official (Tappen, 1983:92).

The culture of filling entry level posts with employees from outside and filling higher posts with the promotion of internal staff need to be handled carefully. Training of personnel plays an important role in ensuring that work is done as expected. It is apparent that management should therefore ensure that those individuals to be promoted are well trained and are ready to assume more responsibility. Failure to prepare officials for higher positions may lead to senior posts being occupied by the promotion of clerical staff or functionaries who may continue to do the functional work even at higher level positions. It is therefore important that merit should play an important role in the promotion of personnel to higher positions (Cloete, 1985:125-127).

4.12 PROMOTIONS IN THE DEPARTMENTS OF EDUCATION

The DET and the TED made use of the evaluation system to promote school clerks. The PAQ was completed for each employee that has been in the service of the department and who was due for promotion. School clerks were normally due for promotion after a period of three years of service. This kind of promotion was normally carried out for school clerks on the lowest level and it was normally from the junior clerk to a senior clerk (Magagula, 1998).

The former KDEC and the former BDEC were not using the assessment procedure when promoting school clerks. The School Principal, which would be the supervisor of the school clerk, would write a report, as only the report of the supervisor was needed for promotion. Although the procedure that was followed was not complicated for school clerks or the principal, employees could have been advantaged or even disadvantaged in the process as only the supervisor was involved in writing the report (Tladi, 1998).

Before an employee can be promoted to a senior position, the management of the institution must train such an employee in order to prepare him/her for more responsibility in the new post. Because school clerks were only eligible for rank promotions, there was little if any preparation of these employees before they were promoted to the next rank as will be seen in the discussion to follow.

All the departments of education including the MDE had used rank promotion. This type of promotion did not require the creation of a new post because the employee was promoted on the same post. Positions that normally had rank promotions were the lowest posts such as clerk, typist as well as telephone operator posts. The responsibility of the employee did not change much as there was little if

any supervisory duties carried out by the occupant. Promotion in this regard would be from junior clerk to senior clerk or senior typist. All the employees were to be evaluated before such promotions were implemented except in the former KDEC and BDEC where only reports from the supervisors were considered (Masilela, 1998).

As indicated above, rank promotion does not require a vacant post before an employee could be promoted. The situation with regard to the former BDEC and TED was different as these departments had posts of chief clerks at the school as will be seen below.

Post promotion requires a vacant post before a person can be promoted. The post should have a clearly distinguishable higher work level and be accompanied by a higher salary scale. More advanced duties such as the supervision of subordinates are performed by the incumbent of the post. As a result of the requirements for supervision, the majority of departments under the study including the present MDE did not apply this method of promotion at school level. School clerks had no subordinates and thus could not be performing the advanced tasks demanded by the position (Mathlare, 1998).

The only former departments that used post promotion were the former TED and the BDEC. Both these departments had positions of chief clerks at schools depending on the size or nature of the school. Posts in this category were only filled through the advertisement of the post through circulars and the process of interviews followed. The writing of incidents was not considered in this regard for the purpose of promotion (Kgomphiri, 1998).

4.13 SUMMARY

A number of problems have been experienced in schools regarding personnel evaluation. Certain factors such as the evaluation of present and past conduct of employees was not applicable to school clerks for the purpose of promotion to higher positions. This was as a result of the routine nature of the duties of a clerk at school. Another problem that affected personnel evaluation is the frequency with which these officials were evaluated. The monthly reports as well as quarterly reports were not written but only a report towards the end of the year when such were to be submitted to the assessing committee. This situation therefore denied the supervisor and the official assessed a chance to monitor the progress of the employee. Another factor that also seem to have had an influence in the promotion of school clerks was the appraiser ability. School principals were trained as teachers and there were

very little done to train them in personnel evaluation. This situation led to the majority of principals evaluating personnel based on traits instead of the performance of the official. Some of the principals who did not want to be counted as bad managers would give undue points without having reasons to substantiate. The result of such actions led in most instances to the assessing committee reducing the points thus denying the official any promotion. School clerks that benefited in rank promotions were those from the former KDEC and BDEC where the PAQ system was not used and the principal's report was sufficient for the promotion of the employee.

The exposition thus far leads to the conclusion that in respect of staff evaluation, there were serious deficiencies in evaluation of school clerks in the departments under discussion. Needless to say, those deficiencies had at least two serious implications for the provision of support services. Firstly, few clerks were promoted with a resultant demotivation. Secondly, deficiencies in evaluation resulted in shallow determination of training needs with its concomitant lack of purposeful training and the subsequent negative impact on effectiveness and efficiency.

CHAPTER 5 MANAGEMENT OF HUMAN AND MATERIAL RESOURCES

5.1 INTRODUCTION

The management of a school involves the activities undertaken by the school principal to ensure that the objectives of the institution are realized. The school principal is responsible for the management of both human and material resources. In his/her management of the school, the school management team and the school governing body assist the principal in ensuring that effective teaching does take place at school. This chapter will outline the functions constituting the management task of the school principal. This will be in relation to the teaching and non-teaching staff at school.

5.2 MANAGEMENT OF HUMAN RESOURCES

The management function is a complicated phenomenon, which includes various dimensions. Management differs from leadership in that it is more procedurally inclined and concerns the tools for attaining an objective. The objectives of the manager are further complicated by the influence of the guidelines from the constitutional dispensation and the community values and norms (Tappen, 1995:57).

Tommev (1993:5-7) defines management as working with and through individuals and groups to accomplish organizational goals. A manager is also regarded as an individual who is in power and who exercise authority over others in an institution. He/she has the right to organize and guide the activities of others through co-operation or coercion.

Fox et al. (1991) consider management as an all-encompassing function, which includes leadership and motivation. Management is also regarded as those individuals who are in power and who exercise authority over others in an institution. They have the right to organize and guide the activities of others through coercion. The word management thus refers to both activities and the persons undertaking such activities.

Management in any organization plays an important role in the day to day functioning of the institution. No institution can get along without certain important functions being executed. Managers

in actual practice have a dual role. On the one hand the manager has to manage certain activities and, on the other hand, he/she has to lead subordinates by establishing a framework within which they must operate to achieve set goals as successfully as possible. It is therefore clear that the two concepts are interrelated with regard to the effective provisioning of services. It is also a prerequisite for an effective management to establish effective leadership in order to achieve the objectives set by the institution (Westhuisen, 1991:13).

For the purpose of this study, it is pertinent to explain the most important functions which constitute management. Planning, organizing, leading, supervision and control are some of the core functions to be executed by the manager which will be described below.

5.2.1 Planning - theory

According to Sullivan & Decker (1992:39-46), planning consists of the following four stages which play an important role in the provision of services:

- Establishing the objectives of the institution.
- Evaluating the present situation and predicting future trends and events.
- Formulating a planning statement and
- Converting the stated plans into action.

The two most important planning strategies are strategic and contingency planning. Strategic planning refers to the long term planning that is usually undertaken by top management. It is planning that seeks to give direction to the institution and to plan the necessary budget to implement the plans. On the other hand, contingency planning refers to the identification of day-to-day problems that may hinder the successful attainment of the objectives.

5.2.2 Planning in the departments of education

Contingency planning is the one planning strategy which is applicable at the school level. The school principal on an annual basis normally undertakes this planning. It is a way of maintaining activities in a school and setting new procedures for development and growth (MSTP, 2000:5-6).

As noted above, planning is an all-inclusive process, which involves activities that affect the school in general. Aspects that are normally planned for by the principal are those such as a timetable for the school, staff induction and development, curriculum planning and assessment policies. Good planning will also ensure that there is proper collaboration between all staff members with the community and other stakeholders (MSTP, 2000:5-6).

School principals in the former DET, KDEC and BDEC did not give much attention to the planning of the work of clerical personnel at school. The planning that school principals were most concerned about was that of the admission of pupils, the number of teachers needed and the planning of unforeseen increases or decreases in the number of pupils at the school. The work of the school clerk did not form part of the overall planning at the school. The general planning was more focused on the academic matters that form part of the main objective of the school. However, the administrative part needed to be taken into account where the school clerk would be involved in the planning (Magagula, 1999).

In schools that fell under the former TED, the same procedure of planning by the school principal was followed. The difference in this regard was that in schools such as Ben Viljoen, the Chief Clerk at the school was part of the School Management Team (SMT). The Chief Clerk was involved and was aware of all the planning from the teaching side. The Chief Clerk was therefore responsible for the planning of the work of the administrative personnel in line with the academic plans at the school. Another advantage was the number of clerical personnel at these schools where every school clerk had his/her own duties (De Lange, 1998).

Owing to the minor changes that took place since the inception of the MDE, planning in schools that fell under the former DET, KDEC and BDEC regarding school activities still concentrated on the academic matters without the involvement of school administrative staff. With regard to schools that

fell under the former TED, planning at school level continued to include the administrative staff through the active participation of the senior administrative official at the school (Masilela, 1998).

From the preceding discussion it follows that strategic planning was non-existent at the majority of schools.

5.2.3 Organizing - theory

Organizing, according to Hanekom et al. (1987), consists of an orderly and systematic arrangement and grouping of functions, posts and institutions that are directly connected with the main objectives of the authority concerned. Organizing therefore ensures that the objectives of each institution are fulfilled. This management is enabled by the structural division of work into sections that are coordinated and linked to the line of authority that runs vertically through the institution. Organizing ensures that the attainment of an objective is facilitated by the arrangement of individuals in a hierarchical pattern of authority allowing each higher level to supervise each subordinate level.

When an institution has established a strategic plan, the organizational structure to carry out the plan must be established. Five main steps are considered with regard to the organizational arrangements to achieve the preconceived objectives. These are (a) the consideration of the objectives and the strategies of management, (b) the determination of the principle tasks to be executed, (c) the division of the principle tasks to be executed into sub-tasks, (d) the determination of people responsible to carry out the tasks and (e) evaluation and giving feedback on the objectives that have been set (Sullivan & Decker, 1992:47-49).

The following diagram illustrates the five organizing steps

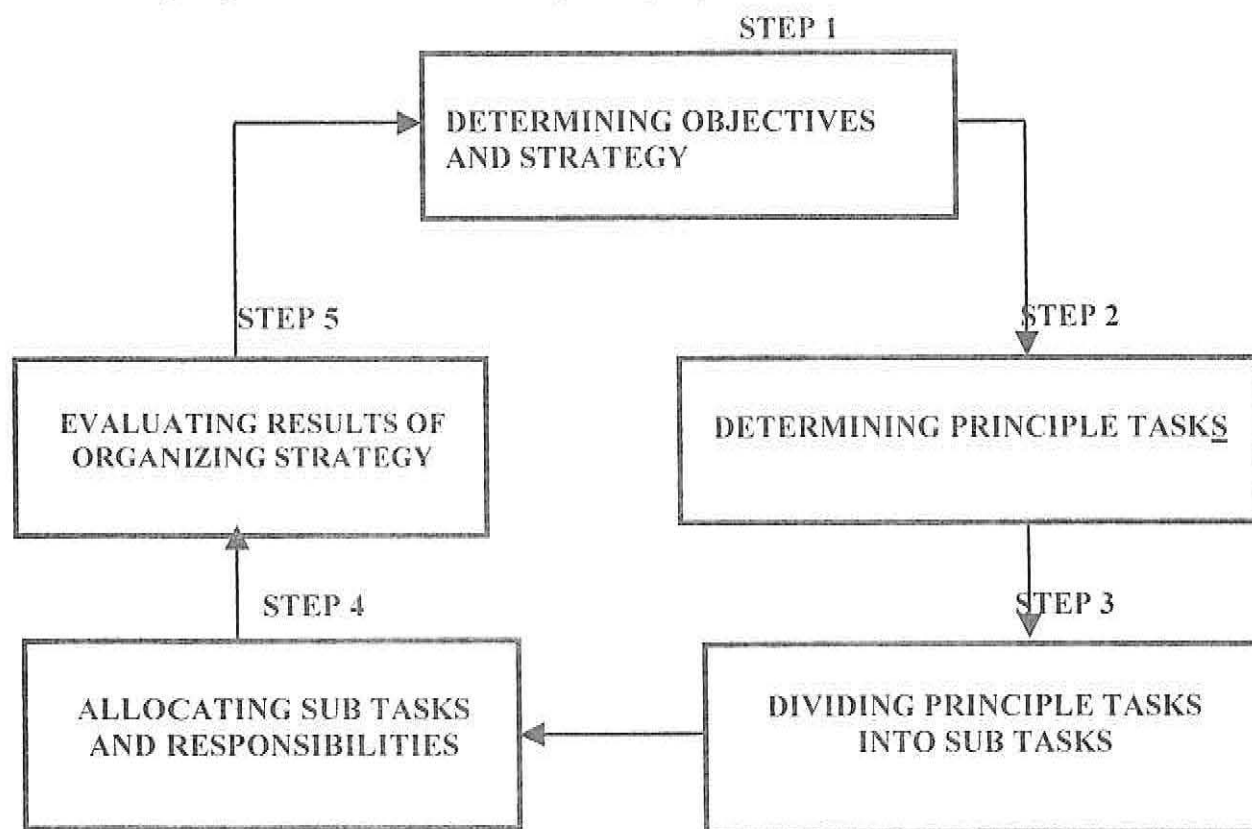


FIGURE 5. A (Sullivan & Decker, 1992).

Another aspect of organizing is informal organizing. Informal organization specifically allows for the human element in the institution in that informal organizing as such does not follow the formal organizational arrangements. The informal organizational structure tends to be more influential than the formal structure. This is a result of inter-personal relations that may lead to informal leaders being identified and playing important leadership roles. Staff members are normally more loyal to the informal organization than the formal structure. This biasness makes it necessary for the management of an institution to always acknowledge and utilize the informal structure to realize the objectives of both individuals and the broader institutional objectives (Hanekom et al., 1987).

5.2.4 Organizing in the departments of education

Schools under the former DET had school committees which were responsible for the policies at the school. The committee comprised of the School Principal and the elected members from the parent

body. Among those elected to the committee, there was a chairperson, secretary and the treasurer. The school committee determined the fees to be paid by each pupil for the school fund. The treasurer was responsible for the banking of the monies collected by the school clerks or the teachers at school (Magagula, 1998).

The schools that fell under the former TED had School Governing Bodies (SGB's). The governing of the school rested with this body that comprised of the School Principal, the Deputy Principal, the Chief Clerk or a senior administration clerk at the school and the elected members from the parent body. The policies of the school also made provision for the co-option of the members of the public with specific skills to the SGB. The SGB was responsible for all issues pertaining to the day to day running of the school (Ras, 1998).

The former KDEC and BDEC schools had school committees. The school committees were also elected from the parent body and also included the School Principal. Although the school committees were responsible for the determination of the monies to be paid by each pupil, the receipt books for the recording of payments were issued and controlled by the departments. This arrangement made it possible for the officials from the Head Office to inspect the books that had financial implications to the school (Masilela, 1999).

The formal organizational structure that is responsible for the effective provision of services by schools in the MDE encompasses national, provincial and school role players depicted in figure 5B. The management of the school is, however the responsibility of the governing body and the School Management Team (SMT). The SGB, which is responsible for the policy formulation at school, consists of the principal as a member, elected members from the parent body, educators, non-educators, learners and co-opted members of the public. The parents elected to the governing body are those having learners at the school. The South African Schools Act 1996 (Act 84 Of 1996) makes provision for the co-option of any member of the public to be part of the governing body. Such a member should have some expertise in a particular field, which may help the governing body in the running of the school. The SMT, on the other hand, is responsible for the day to day running of the school. The team comprises of the School Principal as the chairperson, the Deputy Principal and the heads of department (HOD's) at the school (Understanding the S A Schools Act, 1997:13-16).

The following diagram shows the organizational structure responsible for policy formulation at the school.

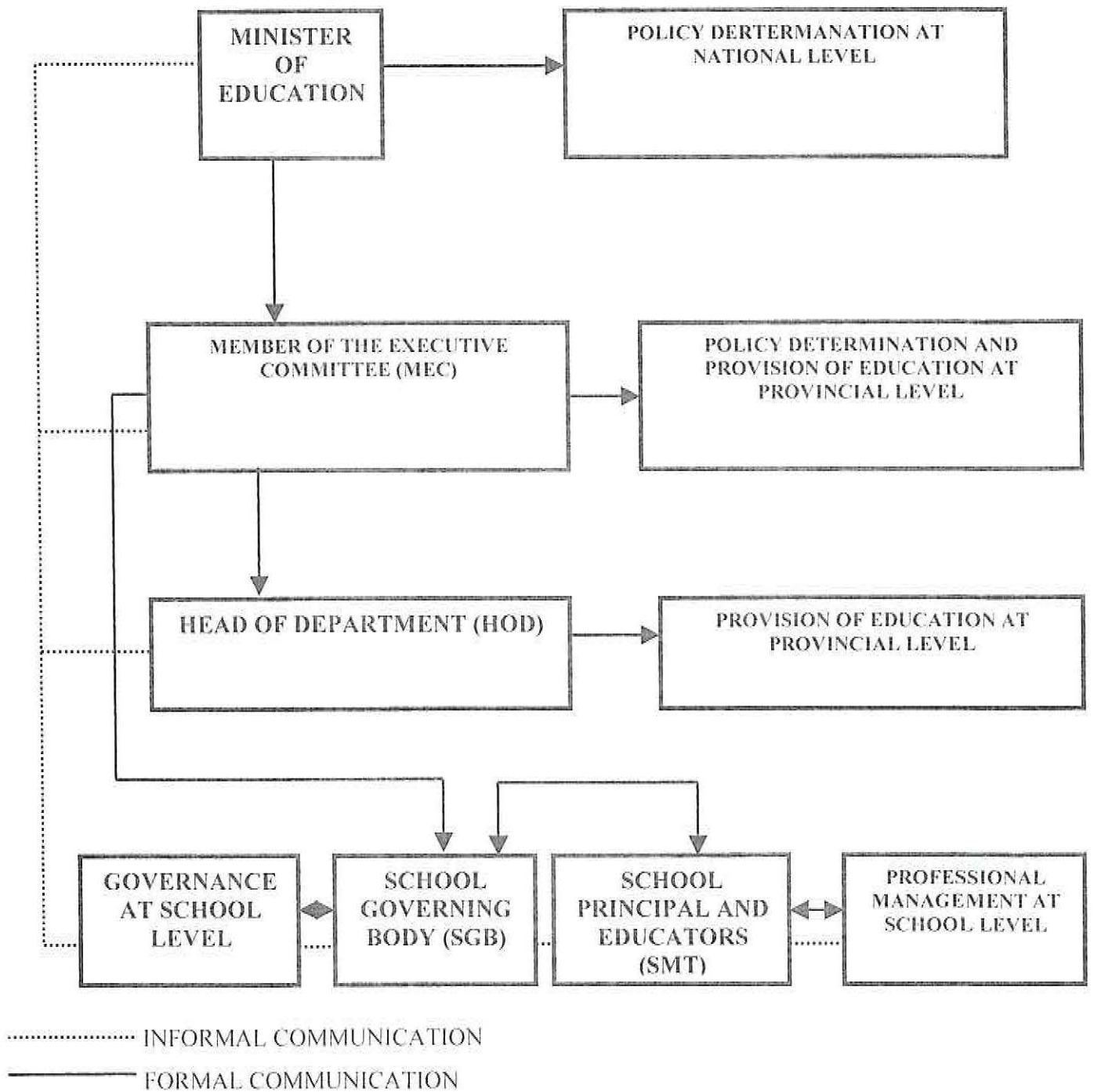


FIGURE 5. B (School Management, 1999).

The diagram above indicates that the School Governing Body (SGB) is responsible for the governance of the school under the authority of the provincial structures of government. It also reports directly to the Head Of Department (HOD) and the Member of the Executive Committee (MEC) of education. School officials on the other hand constitute the SGB at the school. The School principal is thus supported by the SGB and the SMT in the realization of the objectives of the institution (understanding the South African Schools Act, 1997:15).

The School Principal, however, also has to lead the other officials working at the school. This managerial function necessitates school principals to have leadership qualities as will be seen below.

5.2.5 Leading - theory

Leadership is a function that should be executed by every manager in order to get subordinates to do the work without coercion. The success of an institution depends mainly on the cooperation of all in pursuit of the goal of the institution. The leader should therefore articulate the vision of an institution to all colleagues and subordinates to realize the mission of the organization. The resultant success in achieving the objectives of the institution should be the collective responsibility of colleagues and subordinates. The leader should achieve institutional objectives through the use of his/her qualities as a leader, the consultation required and the motivation of subordinates in channeling their energy to the benefit of the organization (Sullivan & Decker, 1992:181).

Leading is a function of influencing subordinates to work voluntarily to obtain the best results. The leader should therefore win the loyalty of subordinates by communicating the objectives of the organization. In his/her endeavour to influence subordinates to realize the objectives of an organization, the leader should be effective in communicating the vision and mission of the institution. He/She must also be able to marry the goals of the organization to that of the individuals for the benefit of both the institution and the employees (Role, 1982:21).

5.2.6 Leading in the departments of education

Leadership in schools under the former DET, KDEC and BDEC had been a problem especially with regard to school clerks. School principals in this regard had little if any influence on clerical personnel in channeling their energies towards the accomplishment of the objective of the school. All the meetings and discussions about the functioning of the school were focused on the academic staff. School clerks were only instructed by the principal or even teachers in some instances on what was expected of them. The role of the school clerk was seen as an assistant to the principal and not as an administrator (Phaleng, 1999).

The availability of senior positions in some of the schools that fell under the former TED led to more visible leadership towards school clerks. The role of leading subordinates was therefore provided by the Chief Clerk which formed part of the SGB. The active participation of the Chief Clerk in meetings that took place at the school led to the realization of the objectives of effective teaching and learning at the school. (DeLange, 1998).

Leadership that was provided to school clerks in the MDE differed from school to school. It would be remembered that very little change had taken place with regard to school clerks. The majority of school principals still applied the same procedures followed in their respective former departments. It is for this reason that some schools were better managed whilst others, on the other hand were poorly managed (Mahlangu, 1999).

Leading therefore cannot be separated from supervision in practice. The two activities are indeed closely related. Consequently, supervision is described below to the extent that it can be visualized as separate from leading.

5.2.7 Supervision - theory

According to Sullivan & Decker (1992:39) supervision is the process of getting work done through others, done properly and on time as well as within the allocated budget. Supervision and management are therefore interrelated with the former being more on the ground with personnel than the manager on

strategic level. The manager looks at issues broadly whilst the supervisor is more concerned with the day-to-day matters of the organization.

For the supervisor to be acceptable to his/her subordinates, he/she should possess the intelligence of the same level as his/her subordinates. His/her qualifications and skills will earn him/her some respect whilst the empathy shown towards subordinates will enable the supervisor to relate easily to subordinates. Supervisors need not have expertise in the performance of personnel functions. However, insight into what subordinates are doing on a daily basis is necessary to enable the supervisor to keep abreast of developments. It is therefore crucial that a supervisor should be given appropriate training to develop his/her skills in dealing with problems of his/her subordinates (Dull, 1981:82).

5.2.8 Supervision in the departments of education

Supervision of school clerks in the former DET, KDEC and BDEC varied from school to school. In some schools supervision was more evident than in others. The misunderstandings concerning the functions of a school clerk could have led to the ineffective supervision of these employees at school. The other aspect, which could have led to poor supervision of school clerks, was the reporting structure in some of the schools. Any teacher could give instructions to the school clerk and that seemed to have caused confusion and conflict between school clerks and the teachers. The lack of a clear line of authority did not only affect good human relations but also had negative implications towards the control of material resources at schools (Mahlangu, 1998).

Supervision of school clerks seemed to have been more effective in the schools that fell under the former TED. The School Principal was always directly involved in the day-to-day activities of the school clerks. In high schools where there was a Chief Clerk, the officer was directly involved with the support of the principal (DeLange, 1998).

The situation with regard to the supervision of school clerks in the present MDE had not changed. The staffing at these schools was still the same as in the former departments and therefore the different schools followed the same procedures as before. The formulation of common job descriptions and duty sheets, coupled with the creation of posts per requirements could have alleviated the problems experienced in the department (Ramaboya, 1999).

As explained above, supervision and leadership are the processes of getting subordinates to do the work without coercion. For the realization of the objectives of the institution, it is nevertheless important that the leader put control measures in place as will be indicated below.

5.2.9 Control - theory

Control is one of the most important instruments in the Public Service to ensure service delivery. Every official who occupies a managerial position will have to make use of control measures to make sure that public monies are spent as required. Control therefore entails that a manager exercise control over the quality of the service or product his/her section renders. This enables the manager to answer to higher authority. It is thus important that every manager should exercise two kinds of control to ensure that work is done as expected. First to ensure that the decision and the action taken are in line with the legislation and second to make certain that resources are utilized maximally (Hanekom et al., 1987).

Control is not limited to the departmental head or the political head. Every manager down the line of hierarchy in an organization should exercise control and report to those above him/her. It is therefore important that two aspects should be considered for effective control, namely, the setting of objectives to be achieved and the standards and norms to measure the success of the public manager in the execution of his/her duties (Hanekom et al., 1986).

Since effective control needs the setting of objectives and of standards to measure performance, these two aspects of control are described in the following section.

5.2.9.1 Determining objectives - theory

Before control measures can be implemented, policy should be put in place to declare the main objective, which the institution is aiming to achieve. Control requires intermediate objectives in progression towards the attainment of the overall institutional objective. The manager should exercise control in such a way that he/she remains in line with the departmental regulations and the policy of the political head. A manager who does not refer to the set objectives may divert from the main aim of an organization without realizing it. The manager must always ensure that his/her control actions are driven towards the improvement of the spiritual and material well being of the community at large.

Control measures must be implemented to ensure that the objectives of an institution are achieved with little to no wastage from the part of the public servants (Cloete, 1993:192-193).

5.2.9.2 Determining objectives in the departments of education

The determination of objectives in schools under the former DET, KDEC, and DBEC took place with regard to the academic performance at the school. The objectives were set at the beginning of the academic year where all the teachers were involved. The review of the performance at the school in the past academic year was also done during the same meeting. These meetings took place without the involvement of the school clerk. As a result, there were always problems encountered with the realization of the objectives set due to the late supply of support materials (Leshabane, 1999).

In schools under the former TED, very little disruption of the learning process took place as a result of the lack of support material. The Chief Clerk at the school was involved in the setting of the objectives to be achieved by the school. It was therefore possible for the administrative planning to be in line with the objectives to be achieved by the academic staff. One such planning was the arrangement for the administrative personnel to resume their duties after Christmas holidays before schools re-open in January (Ras, 1998).

The continuing lack of involvement of the school clerks in the planary meetings in some of the schools in the MDE resulted in the disruption of the teaching process. There was always a shortage of textbooks, cleaning materials and other consumable materials necessary for the smooth running of the school. The objectives were still set based on the academic matters without the inclusion of the support section that could help in the realization of the objectives of the school (Masilela, 1998).

5.2.9.3 Setting standards - theory

Standards are the benchmarks against which the performance of the official can be measured. The main objective may be set by the officials at the upper levels of the structure whilst the manager, together with subordinates will need to develop standards to measure the performance of workers in line with the main objective of the organization. This may necessitate the involvement of all those who will be expected to perform in order to achieve the set objectives. Standards must therefore be set in collaboration with employees. Each subordinate must be involved in a division with his/her supervisor

to ensure that realistic and achievable standards are set. While the standards should be set taking into account the abilities of a general performer, provision should be made for those who may perform above the set standards. This will therefore encourage even the under performer to perform better in order to attain good results (Booyens, 1993:617-618).

It is the duty of every manager to ensure that each official understands what is expected of him/her. Every manager should thus communicate the aims and objectives of the institution to all members. The discussion of the set standards must take place with individual employees to make sure that they understand what is expected of them. The manager should not only communicate the standards but should continuously give feedback to subordinates on their performance. This could take place either formally or informally. Formally, the manager could indicate how individuals perform through a circular, a meeting or during an interview after the official has been evaluated. The manager could talk to the employee after a meeting or during spare time to indicate the performance of the employee which will constitute the informal communication (Booyens, 1993:617-618).

5.2.9.4 Setting standards in the departments of education

The setting of standards of performance in the departments of education took place with regard to the academic activities. The setting of standards on performance of employees was done with regard to teachers. Teachers were involved in meetings with the school principals to determine the expected level of performance at the school. The measure of performance by a teacher was based on the results achieved by the teachers in a particular academic year. The setting of standards was not extended to the administrative support service. The evaluation of the school clerks where applicable was not related to the standards set but to the number of years the employee has been in a post. Although there were no standards set for school clerks under the former TED, the performance of school clerks was generally better as compared to the other former departments and the MDE (Masilela, 1999).

The setting of standards requires the implementation of measures to ensure that employees perform as expected. The following instruments to measure control are discussed.

5.2.9.5 Instruments to measure performance

The setting of objectives and standards and observation of the norms are part of the control mechanisms available to the manager. As soon as all are aware of the objectives to be attained, some instruments need to be put in place to ensure that there are no deviations from the set performance standards. The following are some of the control instruments.

5.2.9.5.1 Inspections - theory

Inspection is one of the most important control measures available to a supervisor. It normally takes place where and when the work is done which makes it more relevant than the other methods. Through the use of inspection, the supervisor can be in a position to control and to implement remedial measures whilst the employee is doing the job. If inspection is carried out by an unqualified person, that can result in faultfinding rather than remedying the situation. Inspection must therefore be undertaken by qualified people for it to succeed (Cloete, 1993:190-191).

5.2.9.5.2 Inspections in the departments of education

Inspection, as one of the tools available to the manager for the monitoring of performance was not used in the former DET and TED. The only inspection that took place was carried out by the Head of Department (HOD) on the work of teachers for a specific subject. This kind of inspection was also limited to the work of teachers and did not include clerical work. The School Principal would only be aware of what the clerk was doing when signing letters typed by the clerk (DeLange, 1998).

The supply of receipt books to schools in the former KDEC and BDEC made it possible for inspection to take place. This kind of inspection was carried out by officials from the Head Office and was only limited to the financial records at the school. The School Principal would only be aware of the functions of the school clerk when he/she had to sign what the school clerk had typed (Mahlangu, 1999).

The changes that took place in 1994 took away some of the control measures in schools that fell under the KDEC and BDEC. Receipt books were no longer supplied to these schools which resulted in the discontinuation of inspection from the head offices. There had been no inspection of the work of school

clerks at school. The only control measures available in some schools in the MDE were measures put in place by the School Principal himself/herself which led to differing approaches (Raphuti, 1998).

5.2.9.5.3 Written reports - theory

Written reports are commonly used in the Public Service. A written report gives an account of what happened in a more tangible manner than verbal reporting. It also serves as evidence to the supervisor on what transpired as compared to unwritten reports. The drawback of this method of control is that it may not indicate the true situation as the writer can be selective in writing. It could also be of little value to those in higher authority as the report writer may not have been informed of the scope to cover in his/her report (Cloete, 1993:190).

5.2.9.5.4 Written reports in the departments of education

The reports that were written for school clerks in the former DET and TED were those concerning the promotion of an employee. School clerks were expected to keep information in their diaries on what they were doing which was to be markedly better than the normal daily duties. According to the Public Service ACT 1984 (Act 111 of 1984), employees were expected to write quarterly reports for submission to their seniors. This legislation together with the monthly reports by the supervisors were not followed in the majority of school (DeLange, 1998).

School clerks in the former KDEC and BDEC did not write reports about their performances. The School Principal wrote the report when the employee had completed three years of service. The aim of the report was for the promotion of the employee and not to measure the performance. School clerks were not involved in the writing of the report. The School Principal would write the report and submit to the Circuit Manager who would in turn submit to the Head Office (Mahlangu, 1998).

All school clerks in the MDE were expected to write personnel evaluation reports. The employees were expected to write these reports backdated to 1996 when some of the employees qualified. Like the reports written in the former DET and TED, these were also meant for the promotion of employees and not directly related to the performance of an individual (Masilela, 1998).

5.2.9.5.5 Verbal reports - theory

Verbal reports refer to the eye-to-eye meeting between the manager and a subordinate. When a subordinate reports to his/her superior, it would normally take a short period of time that could allow any misunderstandings to be clarified easily as the discussion progresses. Through verbal reports, the supervisor would be able to influence subordinates to work voluntarily. The problem with verbal reporting is that managers seldom have the time to discuss issues relating to administrative work (Cloete, 1993:189).

5.2.9.5.6 Verbal reports in the departments of education

The fact that school clerks were normally housed in administrative buildings led to close working relationships between the School Principal and the school clerks. The advantages provided by those arrangements were, however, not utilized by the school principals for effective communication with the school clerks. The reports that were given were more instructional than a two-way process where information was shared. School principals did not give reports to school clerks on the decisions taken in meetings with teachers and the SMT. The situation led to some of the school clerks receiving information directly from the circuit offices which in some instances tended to contradict what the principal had communicated. The two-way communication was applicable in schools under the former TED. In those schools the Chief Clerk took part in meetings held at the school and was able to give feedback to his/her subordinates (DeLange, 1998).

The manager of an institution is responsible for the control of both human and material resources. Through the control of subordinates as indicated above, the School Principal could be in a position to also manage resources through others as will be seen below.

5.3 MANAGEMENT OF MATERIAL RESOURCES

5.3.1 Financial management - theory

According to Cloete (1985:141), public finance is a particularly sensitive matter. The constitution and other legislative provisions make it possible for the executive institutions to prepare budgets for approval by the legislature. After the budget has been approved by the relevant legislature, the

executive institutions are enabled to implement the budget for service delivery to the communities. Each executive institution is answerable to the public with regard to the spending of public monies. It is therefore the responsibility of the Head of Department to ensure that proper control measures are put in place to avoid wastage of public funds.

The sensitivity with which the management of public funds is held led to different approaches used to ensure effective utilization of the money. The different approaches are the line-item budgeting, performance budgeting and zero base budgeting as discussed below.

The line-item budgeting is an important oriented type of budgeting. This is the type of budget that concentrates on the kind of inputs received but does not indicate what activities or outputs to be accomplished are. It concentrates on the available resources that are normally based on the allocation from the previous financial year. Line-item budgeting is therefore incremental in nature as it uses the base from the previous year's budget as a starting point (Sterling, 1986: 363-369).

Performance budgeting concentrates on the outputs of an institution. This type of budgeting is focused on what the institution would do with the allocated money. The institution must be able to tell the public on how much was used for what services in a particular financial year. Although it is difficult to measure the performance of an organization in terms of the budget, the size of the allocated budget as well as the number of staff would essentially measure the importance of the service rendered by the institution and thereby measuring its delivery of services to the public (Sterling, 1986: 365).

Program budgeting is concerned with the programs the institution has to undertake. The program budgeting is mainly aimed at planning and setting objectives of the institution. The objectives will thus be attached to programmes which will be allocated the budget to realize such objectives. Program budgeting extends from the line-item budget which ensures the what of each item the money was used for to the performance budgeting which looks at the overall achievement of the organization in terms of service delivery. Program budgeting is the most ambitious of the results oriented approaches. It focuses on the long-term results of service delivery that ranges from one to five year period (Fox, 1979: 173-176).

The zero base budgeting is the budget process that does not take into account the previous years expenditure and budget as a base. It is the opposite of the line item budget which is incremental in

nature. The zero base budget demands the justification of the entire budget submission from ground zero. Although this type of a budget is detailed and requires every project to be explained, it is nevertheless too burdensome for management to detail every program from zero. The management of the institution has to rank each program on its merit. Those that are of least importance may face the possibility of being discontinued as this type of budget is analyzed on an annual basis from zero (Shafritz & Russel, 2000: 446-453).

The different types of budget serve the purpose of service delivery by the different state organs. The budget specify the functions to be undertaken, the amounts of money to realize the objectives as well as the number and type of employees to execute the functions (Sterling, 1986: 365).

Whatever the type of budget used by the public institution, three most important steps need to be undertaken by state institutions regarding the budget. The three steps are the preparation of the budget, submission and approval by the relevant legislature and the implementation to be carried out by the institution. The three steps are briefly described below:

The preparation of the budget in the Public Service is the responsibility of the executive institutions. Because the money appropriated by the legislature would always be insufficient, it is important that the officials who man the executive institutions prepare estimates of income and expenditure for consideration by the legislature. The executive institutions should therefore consider every aspect of service delivery that they intend to carry out. The preparation should take into account the planning in the short, medium and long-term service delivery projects. The period of the budget is normally twelve calendar months and starts on the 1st of April to the 31st of March the following year in South Africa. Budgets may be prepared in terms of the activities that took place the previous financial year or be started from zero depending on the type of the budget that is applicable. It would always be important to divide the budget into current and capital expenditure. The current expenditure includes salaries of employees and other consumable material such as stationary whilst the capital budget involves more expensive items such as equipment, buildings and other related matters (Cloete, 1985: 142-145).

After the budget has been prepared by the relevant institution, it should be submitted to the legislatures for approval via the treasury department. The legislatures allocate time to debate the proposed budgets by the department. After the budget has been approved by the legislature, it becomes law and departmental heads are responsible for the implementation of the budget. The head of each department

is accountable to the legislature with regard to the spending of the allocated budget. It is thus important that control measures are put in place by departments whilst the money is kept pending payments of accounts incurred during service delivery (Cloete, 1985: 144).

The final approval of the budget reflects the programs of work that need to be undertaken for a particular financial year. It should be remembered that the budget submitted to the legislature is based on the estimates of expenditure. The executive institution should be able to explain any deviation from the approved budget. The head of department should therefore be able to explain the reasons the money had been used for (Cloete, 1985: 142-146).

Schools under the departments of education covered in the study were not involved in the preparation, submission for approval and the implementation of the budget except the former TED. All the necessary activities related to the above were carried out by higher offices with schools supplying information as indicated below:

5.3.2 Financial Management in the departments of education

The former DET used the Management By Objective (MBO) type of budget. The budget was prepared at the Area Office where the Area Manager, circuit managers and the Head of Administration at the Area Office were involved. Schools were only required to submit their requirements immediately after schools had re-opened. The requirements per school were taken into account when preparing the budget at the Area Office. After the budget had been prepared, it would then be submitted to the Regional Office where a consolidation of all budgets from other area offices would be made. The Head Office of the DET would in-turn consolidate the submitted budgets from different regions and prepare a submission to the legislature for approval. After the approval of the budget by the legislature, the implementation process took place at the area offices. Schools were supplied with the cleaning materials, equipment and other consumable resources needed for effective teaching to take place (Shaku, 1998).

Schools under the former TED prepared their own budgets for submission to the Regional Office. The Regional Office would then consolidate all the submitted budgets and submit to the TED Head Office. After the budget had been approved, schools were allocated in terms of their submissions that were called grants. Schools under the TED were semi-autonomous and were thus responsible for the

implementation of the money allocated. All the necessary materials and equipment were bought from the allocated budget. The money collected from parents as school fees was also used to supplement the budget provided by the department (Ras, 1998).

The KDEC and BDEC schools were not involved in the preparation of the budgets. The head offices of both departments prepared and submitted the budgets to their respective legislatures for approval. These budgets only included estimates on the salaries of employees, equipment such as furniture as well as for the school buildings. Not all schools in the former BDEC were built from state coffers. Some schools were built from monies donated by the communities for such purposes. Schools in the former KDEC and BDEC had to buy their own cleaning materials and other consumables from the school fees contributed by parents. Electricity and water, where applicable were paid for by the homeland governments through the head offices of the KDEC and BDEC (Masilela, 1999).

The dawn of the new South Africa in 1994 led to the enactment of the South African Schools Act 1996 (Act 84 of 1996). The Act made provision for the financing of schools from both the public funds and those contributed from the parent body. Section 35 of the Act provides for the Minister of Education to determine the norms and standards for school funding. It is also stated that the state should fund public schools from public revenue on an equitable basis in order to ensure the proper exercise of the rights of learners to education and redress the inequalities of the past (National Norms and Standards For School Funding, 1998:4).

Although public funds are made available through Parliament for the purpose of school funding, the National Department of Education (NDE) is not responsible for the budgetary process at schools. The allocations for school funding are made by the Provincial Education Departments (PED'S) from their overall allocations from the NDE. The South African Schools Act of 1996 makes provision for the PED'S to provide information to schools on the purpose of the budget. This information should be made available to schools not later than the end of September each year. Schools need to prepare their budgets as soon as they have received their allocations from the Province. What is important in their draft budgets is to indicate their expectations for the new financial year in relation to expenditure of the previous financial year (National Norms and Standards 1998:7-10). An example of the forms for the budget are attached as annexure D and E.

In pursuit of the government policy of progressively providing resources to safeguard the right to education of all South Africans in terms of the South African Constitution Act of 1996 (Act 108 of 1996), public spending on education is targeted at the needs of the poorest schools. It therefore stands to reason that the allocation of funds will be based on the economic conditions and the ability of the parents to pay. The poorest schools are allocated more money whilst those that have been in better positions historically are allocated less to redress the imbalances of the past. The payment of school fees, as will be seen in the next paragraph is based on the ability and the economic standing of the school community (National Norms and Standards for School Funding, 1998:7-10).

The SGB together with the School Principal carry the responsibility of raising more funds for the school. The SGB can do this by organizing with parents to increase fees. The school could also do this by operating tuck shops or by asking for donations from the communities or the business people in the area. In the event a decision is taken to increase school fees, provisions in the South African Schools Act of 1996 must be taken into account. Provision is also made for the exemption of parents who cannot afford school fees taking into account the right of each child to education. The SGB together with the parents have a difficult job of deciding on the exemption of certain parents (National Norms and Standards for School Funding, 1998:6-10).

When the SGB has agreed with the parents to collect school fees, each teacher in a classroom should collect such monies. The SGB secretary will hand the teacher responsible a receipt book where all payments will be recorded. After the teacher has collected the monies, it would then be handed to the principal for banking. The principal, where applicable, is expected to bank the money as soon as possible without waiting for it to accumulate into large sums (National Norms and Standards for School Funding, 1998:206-207)

Although the South African Schools Act of 1996 makes provision for the allocation of budgets to schools, only a handful of schools have been identified to start with the budget allocations. The majority of schools had not yet started due to the lack of required skills to deal with budgetary matters. Those that had been affected most were the schools from the former DET, KDEC and BDEC. There were some from the former homelands and the DET who were identified and allocated budgets but could not use it successfully. Those schools that were allocated budgets called it "paper budgets" (See the South African example of such a budget for schools attached as annexure D) because it did not come as cash but only as money on paper. As a result the majority of schools failed to take advantage

of the allocation to render effective service. The result was that the money was returned as unspent which could have implications for future allocations to such schools (Mahlangu, 2000).

5.3.3 Inventory management - theory

Inventory management is an activity that should be undertaken by every manager in an institution. The responsible manager would have to either balance and update the inventory on a daily basis or do the physical count of stores at a given period. The system whereby the inventory is balanced every day is called the perpetual system whilst the one where stock counting takes place physically is called the periodic system (Siegel & Shim, 1990: 106-108).

According to Cloete (1993: 216), stores management is the responsibility of the manager of an institution. The manager will have to make sure that the money allocated to buy stores and equipment is used for the purpose it is allocated. The manager also has to keep record of all available stores in his/her institution. Stores that become redundant or absolute should be written off and a record kept. If there is a surplus in the available stores, such should be indicated in the stock register and be transferred to where there is shortage.

The management of stores needs to be planned carefully to ensure that not too much or too little stores is kept by an institution. Inventory management involves a trade-off between the cost of keeping inventory versus the benefits of ordering when required. The keeping of too much stores may lead to increased costs in terms of storage, space, possibilities of theft as well as the required person power to maintain the inventory. If too much stores is kept in a storeroom, it is essentially the funds that are tied up instead of being used in other areas where they are required. The manager has the responsibility of developing policy to manage the level of inventory in the institution whilst at the same level being able to attain the desired results. If the policy of a manager is such that stores should be kept to a minimum and orders placed as required, it could lead to more expenses incurred as a result of placing orders one after the other as well as delivery, space and follow-ups to be made. A balance needs to be achieved by the manager in order to use public funds sparingly (Spiro, 1982: 152-154).

The management of an institution must keep a reasonable level of inventory since the bulk of assets are tied-up in the inventory. It is accepted in the majority of operations where the inventory is closely controlled that 25 to 50 percent of the total budget is invested in inventories. It is for this reason that

management must consider the money kept in inventory and decide if it could not be used elsewhere where it is most needed (Johnson et al, 1972: 326-329).

As indicated above, the management of material resources plays an important role in an institution. Managers need to put control measures in place to ensure that not too much or little stores are kept. The management of inventory at school is not an exception to this rule as will be seen below.

5.3.4 Inventory management in the departments of education

Stores management in the former DET was divided into two categories. The Regional Office of the then DET had a stock taking team. This team comprised officials from the Regional Office assisted by the Area and Circuit Office personnel where stocktaking would be conducted. Stocktaking was conducted once a year and a report generated and submitted to both the Area Office and Regional Office. The main focus of stock taking was the counting of equipment and furniture. The items that were indicated as a surplus, redundant, obsolete or in shortage were indicated in a report to the Area Manager and the Regional Office. Stock taking teams would usually make recommendations on the surpluses, shortages and redundant furniture for disposal. The recommendations of the stock taking team were also used by the Area Office in its planning for the next financial year's budget. All the officials who were involved in stocktaking were trained in the Provisioning Administration Standard (PAS) (Leshabane, 1998).

Due to a lack of financial resources to cover all the needs at school, consumable materials such as chalk, dusters, brooms and toiletries were supplied by the department. However, the schools had to augment the supply by purchasing out of the school fees collected from the pupils. Stores items bought from the school coffers were not accounted for in the inventory register but on the stock register book kept by one of the teachers. In some of the schools in the former DET, each teacher was responsible for the register of all items used and reported these to the HOD in charge whilst others had one teacher responsible for the whole school (Magagula, 1998).

The involvement of school clerks in the ordering and control of stores in the former DET was limited. In schools where there was a post of a clerk, such an official was only responsible for the completion of requisitions, arranging transport to collect materials and to assist the stock taking team from the

Regional Office. The distribution of stores had been the responsibility of the teacher nominated by the School Principal (Mathebula, 1998).

In the former TED, stores control was the responsibility of the school clerk in conjunction with the teacher allocated for that purpose. The school clerk was responsible for the requisitioning of the necessary materials whilst the teacher did the actual distribution. In the case of schools with hostel facilities, the hostel matron was also involved in the requisitions together with the ordering clerk (Ras, 1998).

The situation with schools that fell under the former KDEC and BDEC was different in that stock taking was not conducted as expected. This was a result of the limited materials supplied to schools by these departments. Schools were only supplied with furniture and equipment with no consumable materials. Each school was expected to purchase such materials from the school funds. The lack of stock taking on an annual basis led to a situation where furniture in access was packed in classrooms in other schools whilst others had shortages (Lekalakala, 1998).

The management of consumable materials in the former KDEC and BDEC was also the responsibility of the School Principal but delegated to one of the teachers. However, in some schools, the clerks were involved to a limited extent. Each class teacher had to indicate, based on the number of pupils in a classroom, the number of boxes of chalk, dusters, brooms and stores that he/she would be requiring. The lack of supply of the basic requirements such as chalk and cleaning materials was evident in some of the schools where a cloth would be used to clean the chalkboard (Masilela, 1998).

In terms of the Treasury Regulations of 1999, the accounting officer of an institution must ensure that control systems of assets exist in his/her institution. The system should also provide for preventive measures to ensure that the available stock is not stolen, wasted or lost through negligence. It is also the responsibility of the head of the institution to make certain that stock levels are kept an optimal and economic level (T.R. H10.1.1-10.1.2).

The MDE was responsible for the supply of furniture and other equipment to schools. Other resources such as stationary, textbooks and consumable materials were also supplied to schools. Although the supplies were made by the MDE, there was always an acute shortage of textbooks, stationary and other consumable materials. This seemed to have been the result of the late delivery of textbooks as a result

of the late submission of requisition forms from the school. Some schools were still continuing replenishing the consumable stock by purchasing out of school funds collected from the parents (Maganyane, 1998).

As had been the norm, school principals were responsible for stores management in the MDE. However, the principal could nominate a teacher to take charge and distribute the consumable materials to other teachers. School principals were being helped by the stock taking team stationed at the Provincial Head Office of the MDE. The team was, however, unable to cover the whole of Mpumalanga Province as only four officials were allocated during the financial year 1997/1998. As a result of the shortage of personnel in the stock taking team, the situation was not balanced where there were some schools where there was an oversupply whilst in others there was a shortage (Maganyane, 1999).

5.4 SUMMARY

The role of the principal in the management of both human and material resources could play an important part in the delivery of service. As explained above, planning of the work of subordinates is important for service delivery. The organization of an institution with clear communication channels may also enhance the productivity of subordinates. School principals are managers as well as leaders. The leadership role requires the knowledge and understanding of the functions to be undertaken to eliminate chances of confusion. Principals as school managers also need to use instruments for controlling the work of others to ensure that work is done as expected. It is therefore important that the principal should inspect the work of the school clerks in order to give support where necessary. The school principal also has to make use of the quarterly reports to assess the performance of the employee continuously as teachers are controlled by the annual reports submitted. Quarterly reports can also assist in identifying the weaknesses of the official and should give support to the school clerk. The principal should also indicate the role of the school clerk with regard to the control of stores material. In some schools, the clerk is involved to a limited extent whilst in others it forms part of his/her functions. These discrepancies therefore lead to some schools receiving goods and services on time whilst others do not which has had an impact on the delivery of services by the teachers and the majority of the schools under the study. It would thus appear that school principals with the exception of the former TED were neither properly trained in management nor actively involved in managing the

administrative side of schools. For these reasons, support services were not properly managed, resulting in ineffectiveness and inefficiency.

CHAPTER 6 SUMMARY AND RECOMMENDATIONS

6.1 INTRODUCTION

In this chapter of the dissertation the findings made in chapters 2-5 are firstly summarized. Summary takes place according to heading and according to theory and to practice in the education departments. Secondly, recommendations based on the findings are made to improve support services by school clerks.

6.1.1 Job creation, recruitment and selection

Effective provisioning of service in the Public Sector suggest that there should be a creation of posts that would enable public servants to deliver goods and services as expected. Such creations of posts need to be preceded by job analysis, description and specification. It is important to undertake job analysis, description and specifications in order to categorize and simplify the job before posts are created. Such simplification could also indicate through job specification what knowledge, skills and aptitudes are required from the job incumbent. Job analysis, description and specifications enable the management to identify training and developmental needs of the employee. The recruitment process is also facilitated by the above-mentioned factors that make it easy for the elimination of candidates that are not qualifying at the beginning of the recruitment process.

The second aspect after a post has been created is the selection of the best candidate for the job. This process would necessitate the knowledge and the required qualities from the official doing the selection. The person should also be well conversant with what the job incumbent is expected to do. The successful selection process should allow candidates to compete on an equal footing. Finally, it should also be able to get the fit between the organization and the candidate. The interview process provides the interviewers with the opportunity to get to understand the potential employee in detail and how he/she responds. The final selection process, which is the probationary period, will allow the supervisor to observe and measure the performance of the individual against the requirements of the post.

The former departments of education and the MDE did not undertake job analysis, description and specification before posts were created. In the former DET posts were created at Regional Office and

allocated to schools by the Area Office. The TED created posts at schools when there was a need, however, the requirements of the posts were not clearly indicated because there was no job analysis, description and specifications done. In the former KDEC and BDEC posts were created at the Central Personnel Offices upon request from the relevant school. The MDE did not create new posts as a result of the moratorium on new appointments.

The study undertaken in the different schools has indicated that the selection process differed from one department to another. The former DET and TED started the selection process with the scrutinization of the application forms, conducted interviews that were both structured and unstructured and finally quarterly reports were completed for employees on probation. On the other hand, the former KDEC and BDEC did not go beyond the scrutinization of the application forms at the Central Personnel Office. The final selection process of probation was also not handled properly as no quarterly reports were written. Employees were only confirmed permanent when they were due for promotion or have to apply for a housing subsidy.

From the foregoing exposition, it can be deduced that job creation was not given the necessary attention by the departments under the study. None of the former departments did undertake job analysis, description and specification before posts were created. The selection process was based on a general description of the functions to be carried-out without regard to the specific skills required such as communication, typing skills and knowledge of the prescripts. Although the former DET and TED did implement the selection process properly, the non-availability of job descriptions seems to have affected the performance of the newly appointed as the duty sheets were more broad and tended to refer to secretarial functions. It could thus be concluded that without job analysis, description and specifications the provision of effective support service could not be realized in schools under the study. Inadequate selection procedures exacerbated this situation.

6.1.2 Training and development of school clerks

Training and development of personnel is important as has been revealed by the literature study. The training of any individual for better productivity should be in line with the duties of the employee so that it can improve performance. A number of factors have been raised as a cause for the need for training. These have been explained as low productivity, slow service, poor supervision, the lack of coordination and clients complaints. The induction of new employees also plays an important role in

the career path for employees. The induction process can in itself lead to employees realizing the career path that they need to follow. This may assist such employees in registering for courses that are relevant to upgrade themselves. The meetings between management and subordinates had also been indicated as important for effective and efficient service provision. Through the meetings, the manager could be in a position to identify developmental needs of the employee whilst at the same time the weaknesses and strengths are identified. The employee on the other hand is provided with the opportunity to interact and communicate with management on issues that affect his/her productivity at work.

It is evident that the lack of proper job creation, recruitment and selection did not only affect the performance of school clerks but had also impacted on the future development of school clerks. The lack of clarity on what constitutes clerical work at school confused the duties of a clerk with those of secretaries with the resultant negative impact on the formulation of the career path for these officials. As a result a number of factors were identified which required the training of school clerks as will be seen below.

Productivity of school clerks varied from one school to another. Some schools in the former DET were more productive than others depending on the management at the school. The former TED schools did not show low productivity as duties were clearly defined among school clerks. In the departments of KDEC, BDEC and MDE productivity of school clerks was better in some schools than in others. The majority of schools had problems with productivity of school clerks especially with regard to typing and on following-up on queries at the circuit offices for teachers.

As a result of the low productivity of school clerks in some schools, slow service was evident in those schools where there is low productivity. These were mostly in the departments of DET, KDEC and MDE. In the former DET, slow service resulted in the discontinuation of electricity supply to schools with the resultant disruption of the provision of services by teachers.

Poor supervision as one of the indicators of the need for training and of poor management of human resources was also evident in the majority of schools under study. In the former TED where a chief clerk post existed, there was no sign of poor supervision as the Chief Clerk was directly responsible for the administrative activities of school clerks. In schools that fell under the DET, KDEC and MDE poor supervision was more evident. School principals under the above mentioned departments were not

trained in administrative matters which left the school clerk with the option of seeking information from the circuit or district offices. The lack of understanding of the administrative activities by the principals led to confusion between the school clerk and the principal. This was the case because of the different interpretation of information from the circuit by the School Principal and the school clerk. Although a similar situation with regard to training of principals existed in the former BDEC, it would seem that stricter control measures were used in those schools which made it to appear to be better than those mentioned above.

The lack of appropriate training and development of school clerks also had affected service delivery at school adversely. In the former DET and TED, the induction process was carried out almost appropriately as compared to the former KDEC and BDEC. A chance of introducing the school clerk and having to mix the school clerk with the rest of the school employees was lost in the latter cases. The exclusion of the school clerk from the meetings and other proceedings at school also contributed to the isolation and demotivation of the school clerk. The lack of proper supervision by the principal which could be ascribed to the lack of training of principals in administrative matters led to wrong selection of courses by school clerks for distance education and a few clerks in full-time tertiary education.

For the effective and efficient provision of services, both the school principals and the school clerks need to be trained and developed in their respective functions. The training and development of school clerks without such being undertaken for school principals will lead to confusion and poor supervision which would lead to ineffective and inefficient service delivery by school clerks. The lack of such training did indeed contribute to ineffective and inefficient service delivery.

6.13 Personnel evaluation

Human resources is one of the scarce resources available in the Public Service. The training, development as well as the maintenance of employees in an institution should result in the successful provision of services by the public servant. In order to keep employees in one institution over a longer period of time, it is important that such officials be happy at work. High morale could therefore be realized if employees are evaluated properly for the purpose of promotions, notch progressions, merit awards and the identification of training needs.

One of the most important aims of personnel evaluation as explained by literature is to ensure that officials are developed and trained appropriately. This therefore necessitates the active involvement of the immediate supervisor in identifying weaknesses and strong points of the employees. Evaluation also serves the purpose of proper probation, placing employees correctly, identification of needs for growth and maintaining a satisfactory performance.

The PSSC made provision for the evaluation of employees who have completed a year in service at least once a year. Although job descriptions were not available in the former TED and the DET, evaluation of personnel was carried out in these institutions based on the duty sheets available. In the former KDEC and BDEC, the supervisor wrote a report for the purpose of rank promotion of the official. Evaluation did not take place every year as required and there were no incidentations written by the employees themselves.

The MDE started with the evaluation of personnel in 1996 backdated to the 1st July 1995. All employees who were in the rank promotion posts were expected to submit assessment reports for the purpose of evaluation. The fact that the employees under the former KDEC and BDEC did not write incidentations previously caused some problems in their evaluations.

Problems that were encountered in the majority of schools falling under the former KDEC and BDEC were the participation by employees themselves and the lack of understanding of the procedures followed in personnel evaluation by the school principals. It has been observed that employees from the former KDEC and BDEC started by resisting the implementation of the system. They indicated that they did not understand the meaning of the word "incident". Another problem cited was that they were expected to appraise themselves instead of the supervisor doing the appraisal as it was done in the former departments.

Another problem that has been identified is the ability of the supervisor to appraise the employees. As indicated previously, training of principals and school clerks in job evaluation was very minimal to the extent that the majority of principals could not appraise their subordinates.

A number of factors such as the non-availability of performance standards affected the appraiser ability of the supervisor. It will be remembered that the two former homeland departments did not have proper

duty sheets for their employees. It was more difficult to evaluate employees retrospectively without any measurement of the successful execution of duties by the employees.

Lack of standards of performance was not the only problem encountered by school principals in personnel evaluation. Evaluation of personnel in this regard tended to be more on traits than on actual performance. Some of the supervisors based their evaluation on characteristics such as honesty, reliability, adaptability and other traits instead of the actual performance in the job. In some cases the supervisor ascribed the lack of the required or expected performance from the employee on the basis of good or bad working relationship with him/her. This meant that one aspect such as communication problems between the supervisor and the official could affect the whole rating of the employee irrespective of the actual performance.

Whilst the supervisor had problems with personnel evaluation, employees themselves have had problems with the system. The work of a school clerk is more routine than other jobs at circuits or district offices. Because of this matter, school clerks experienced problems with the definition of what an incident was. An incident is defined in the evaluation manual as “what the employee does which is above the normal requirements of the post”. This has been the most common problem found amongst school clerks, as their incidents in most cases did not carry enough credit to warrant a promotion. There was very little if anything a school clerk could do which would be considered to be above average or exceptional. This as indicated above could be ascribed to the routine nature of the job of the school clerk.

The former DET and TED used the system of personnel evaluation before 1994. Personnel in schools falling under this category were promoted from junior to senior clerks through the system. A few employees in the former homeland departments managed to be promoted through the use of this system in the MDE. The majority could not be promoted due to the lack of understanding of the system.

What seemed to have been more frustrating to these employees was that all the different types of promotions such as rank promotions and notch progressions required the writing of a report that should constitute incidents before employees are promoted. Those at circuit and district offices had the opportunity for higher posts due to the availability of post promotion post at the offices.

As indicated in both the literature and the empirical study, the lack of proper evaluation of school clerks has had a negative effect on service delivery. This has been a result of the lack of proper training of both the employees and the supervisors in personnel evaluation. The lack of training of both categories also led to insufficient information due to the reluctance of the employees to take an active role in evaluation. That resulted to the school principals rating all employees on the same level irrespective of the actual performance by the subordinate. Employees who were always working hard were disadvantaged and that led to demotivation of such employees with the resultant provision of service that is ineffective and inefficient.

6.1.4 Management of human and material resources

The proper running of a school involves both management and supervision. Management involves planning, organizing, leading/coordinating and control. The supervisor, on the other hand should use these tools in order to provide effective and efficient service. As explained in the literature study, the manager needs to have leadership qualities in order to influence subordinates to work voluntarily. Supervision will therefore allow the manager to be closer to the subordinates to lead and give guidance on a daily basis to the subordinate.

6.1.4.1 Planning

Management in an institution does not only involve the management of human resources but also material resources. Material resources play an important role in the realization of the objective of an institution. The most important material resources to be managed involve the financial as well as the stores management. Every manager that aspires to reach the objective of the institution will have to be able to budget and to manage the budget appropriated by the legislatures. Parliament. Equipment and other stores bought out of the allocated budget need to be properly controlled in order to prevent abuse, theft or wastage of resources.

The empirical study has revealed that the management of human resources and material resources in schools was not given the necessary attention. The management of human resources in schools was more visible in the professional side as compared to the administrative employees. School principals were more concerned about the planning of the curriculum of the school, school timetable for teachers as well as the development of teachers in relation to their functions. All the departments under the

study did not involve school clerks in such planning with the exception of the former TED. The planning that took place in these schools were undertaken on an annual basis towards the close of the last quarter of the year. Meetings were normally arranged where all employees in the teaching profession were involved to plan for the following year. School clerks in the former DET, KDEC, BDEC and MDE were not involved in such meetings. The chief clerks in the former TED represented school clerks in meetings arranged to discuss the objective of the school. In instances where there was no post of a chief clerk, the School Principal worked closely with the school clerks and they were kept informed of the developments at school. The exclusion of the school clerk from such planning seem to have led to difficulties in merging the objectives of the institution to the administrative activities which could be considered as enabling functions at the school.

6.1.4.2 Organizing

The organizational structure of the institution should facilitate the realization of the objective of an institution. Through the structure, formal and informal communication channels could be identified. Control instruments such as verbal reports, written reports and inspections could also be facilitated by the organizational structure where each employee know and understand the procedure in reporting.

The organizational structure of schools in the departments of education led to poor supervision as well as lack of proper coordination of the administrative support services. The school clerk, as indicated in diagram 3(a) on page 34, was seen as a separate entity from the rest of the school employees. This arrangement therefore excluded the school clerk from the main activities such as planning of the activities at the school. The exclusion of the school clerk in these activities therefore led to the lack of coordination of the administrative functions with those of the teachers. The only exception seemed to have been schools under the former TED where there were posts for chief clerks. Coordination in these schools was much better compared to those schools in the former DET, BDEC and MDE. The chief clerk in the former TED formed part of the management meetings where planning took place.

The organizational structure at the school did not facilitate the management of human and material resources as far as the clerical personnel were concerned. The organizational structure of a school as indicated in figure 3(a) made provision for formal communication between the principal and the clerk and informal communication with the deputy principal and the rest of the staff. This arrangement therefore excluded the school clerk from major activities at school such as meetings with the rest of the

school employees. Although the school clerk was only formally connected to the School Principal, in some of the schools directives were also issued to the school clerk by all the professional staff including teachers.

6.1.4.3 Leading

A leader in any institution needs to acquire enough knowledge about the work of the subordinates. The leader should be able to recognize, assist and correct where necessary the work to be performed by the subordinate. He/she should also be able to communicate and involve subordinates in the planning of jobs to achieve the objectives of the institution. It is also the responsibility of the supervisor to ensure that subordinates understand the objective of the institution. Such an objective must be clearly defined and achievable to enable the leader to constantly monitor and assist subordinates to realize the objective of the institution. The poor status of supervision in the education departments has already been described in 6.2.2 above.

The lack of integration of school clerks in the overall activities of the school seem to have also affected leadership and control of the School Principal on the school clerk. Meetings where the vision and mission of the school were discussed did not involve the school clerk and that made it difficult for these employees to fit in the main activities at the school. Another factor that seemed to have affected the leadership responsibilities of the School Principal with regard to administrative issues seemed to have been the lack of training of principals in administrative matters. The school principals could thus not lead by example in this regard as was the case with teachers. The setting of standards which took place in meetings arranged for teachers also led to the lack of understanding of the support service to be provided by the clerk to achieve such objectives. The control instruments to measure control such as inspections and written reports were not applicable in the majority of schools. Only verbal communication took place in all the schools with regard to reports from the school clerks.

The lack of coordination of the administrative activities in the majority of schools led to low morale, absenteeism and client complaints. The lack of involvement of school clerks in major decisions affecting the school such as annual planning seemed to have caused confusion and isolation of the school clerks. Another factor that has been indicated to having affected school clerks was the evaluation that was not carried out properly. As a result of these problems, the majority of school clerks in the DET, KDEC and MDE absented themselves particularly on the payday. This could have been a

result of both the lack of involvement of school clerks in decision making and poor supervision from the managers. Low morale, absenteeism and client complaints were not as evident in the former TED and BDEC. It has been discovered that the rate at which administrative services were provided in the DET, KDEC and MDE led to teachers having to deal with personnel related issues relating to their conditions of service directly with the circuits. The results had been complaints that teachers are not doing their job of teaching whilst principals were also accused of attending more to clerical work than managing the school.

6.1.4.4 Control

As indicated in the literature study, management involves both human and material resources. The management of material resources in the departments of education seemed to have caused problems to the school principals. Schools that fell under the former DET, TED, KDEC and BDEC were not involved in financial control except the management of school monies contributed by the parents. The MDE had started in the year 2000 with the allocation of budgets to identified schools. The management of the budget proved to be problematic as neither the school principals nor the school clerks were sufficiently trained in budget control. The result has been the returning of the bulk of the money allocated as unused because of the lack of knowledge from the principal and the clerk.

The management of stores has also proven to be problematic in some schools whilst in others control measures were put in place. The former DET and TED departments used stocktaking on an annual basis. These were only limited to equipment at schools whilst the consumable materials such as chalk, dusters and brooms were the responsibility of the principal. The school clerks in the former DET were involved in assisting the stocktaking team from the Regional Office. The responsibility of controlling consumables was left to a teacher nominated by the School Principal.

In the former KDEC and BDEC, stocktaking was not undertaken on an annual basis. That situation led to the pilling of new and old furniture in some schools whilst others had shortages of such furniture. School clerks were not involved in stock control. The teachers nominated by the principals were responsible for stock control and issuing. The situation with the MDE was that a stock taking team stationed in the Departmental Head Office had been responsible for stock taking. The number of officials allocated by the MDE to undertake stocktaking seemed to have affected the effectiveness of the exercise as this process could not be extended to the whole Province due shortage of personnel.

The situation with regard to consumable materials differed from school to school as it was dealt with in terms of the preceding department.

The lack of training of the school principals seemed to have affected the control and management of resources in schools. Teachers delegated with the responsibility of managing consumable items were not properly supervised which led to some schools having insufficient materials whilst others made do with the available stores.

The literature study has revealed that the management of both human and material resources play an important role in the realization of the objective of the institution. The fact that school principals are trained as teachers with little if any administrative training caused the lack of effective and efficient control of both human and material resources which are pivotal in the successful realization of the objective of the institution.

This summary has shown that the support service rendered by school clerks indeed was ineffective and inefficient. Reasons for ineffectiveness and inefficiency are the absence of job creation, poor recruitment and selection, inadequate training, poor evaluation of staff and the lack of training for school principals in management.

The recommendations based on the above findings are formulated in the next section of this chapter.

6.2 RECOMMENDATIONS

6.2.1 Job creation, recruitment and selection

The creation of posts in the MDE should be preceded by job analysis, description and specifications as alluded to by the literature study. Job analysis, description and specification should enable the identification of the requirements for the post. The division of work into smaller units will be made easy by the carrying out of job analysis, description and specifications.

Recruitment and appointment should be done according to the theory described. All the major functions forming part of the duties of the school clerk should be included in the recruitment process. The recruitment process should involve the School Principal as an immediate supervisor. All clerical posts should be advertised through circulars issued by the Circuit Office. The important functions identified during the empirical study such as communication, typing and general administrative knowledge should be included in the advertisement.

The selection process should take place at the school where there is a vacancy. The school principal should be involved from the beginning to the end of the process. The School Principal together with the official from the Circuit Office must be involved in the scrutinization of the application forms as well as during the interviewing process. The interviewing panel should consist of the School Principal as the chairperson, a member of the SGB, the deputy principal and the head of administration at the Circuit Office. During the probationary period, monthly and quarterly reports must be completed which will form part of the annual report of the official.

As revealed by the empirical study, there were no proper job descriptions and duty sheets. Consequently, it is suggested that the following job description and duty sheet be used in all schools under the study to ensure that there is uniformity in the functions constituting clerical work at school. The fourth aim of the dissertation of developing a uniform job description and duty sheet for school clerks is thus achieved.

JOB DESCRIPTION

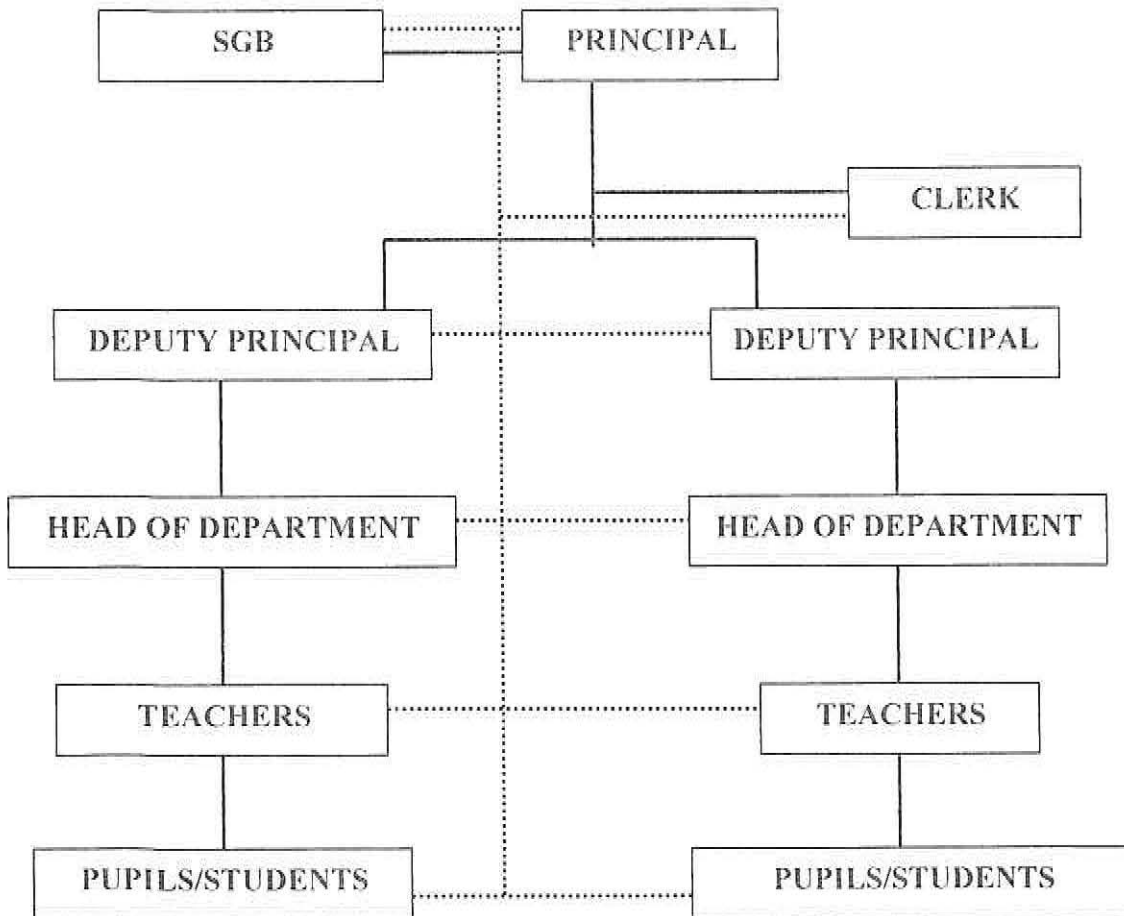
JOB DETAILS

JOB HOLDER:

JOB TITLE:

➤ INSTITUTION:

➤ SCHOOL ORGANOGRAM



..... INFORMAL COMMUNICATION LINE
—— FORMAL COMMUNICATION LINE

JOB PERFORMANCE

To provide support services to the school through the control of expenditure, inventory and provision of the general support service.

KEY PERFORMANCE AREAS

- Handling of administrative work with regard to the admission of pupils and keeping admission book up to date.
- Ordering books, furniture, stationery, consumable materials and equipments.
- Inventory control through stocktaking and stock register.
- Payment of accounts for electricity, water and sanitation.
- Handling of administrative queries in respect of teachers and other employees at school.

KNOWLEDGE, SKILLS AND EXPERIENCE REQUIRED

- Ability to handle administrative queries.
- Verbal and written communication skills.
- Typing skills.
- Knowledge of inventory control.
- General knowledge of forms used for requisition purposes.

PROMOTION TO HIGHER LEVEL THROUGH CAREER PATHING

- Progression to next salary notch.
- Rank promotion to senior clerk.
- Post promotion to chief clerk.

NATURE OF WORK IN THE NEXT HIGHER RANK

- More advanced duties related to support service.
- Supervision of personnel.
- Control of work of others.
- Liaise with the Circuit Office on administrative matters.

JOB DESCRIPTION AGREEMENT

On the part of the holder, the agreement signifies the commitment to and performance of his/her duties to the best of his/her abilities. This will also signify the commitment of the head of the institution to provide the jobholder with the necessary support and authority to perform his/her duties.

Signature of Job Holder: _____

Signature of Supervisor: _____

Date:

Date:

DUTY SHEET OF A SCHOOL CLERK

- Payment of levies and other accounts.
- Handling incoming and outgoing mail.
- Answering telephone and taking messages for teachers.
- Effective control of telephone and electricity expenditure.
- Collection of school fees in consultation with class teachers.
- Liaise with Circuit, District and Head Office.
- Administration of salary vouchers and keeping a register thereof.
- Financial control of both collected school funds and budget allocations from the department.
- Inventory control.
- Any other related job that may be assigned by the supervisor from time to time.
- Ordering and receiving of equipment and consumables.
- Answering queries.
- Drafting reports
- Bookkeeping and banking of monies.

6.2.2 Training and development

The training and development of school clerks should be in line with the proposed job description. Such training and development should create a career path for these officials. The training to be provided should be more on administrative than secretarial matters to enable the school clerk to align his/her duties with those at the Circuit or District Office. All newly appointed school clerks should be subjected to a full induction course. The three stages such as the pre-entry stage, reporting stage and continuation stage must be carried-out by the principal as a supervisor. During the final stage which is the continuation stage, the school clerk should be given all relevant legislation which must be administered gradually for the employee to know his/her conditions of service.

The literature study has indicated that effective management and supervision of subordinates lead to improved productivity. For school principals to manage the activities of school clerks effectively, they should be trained in administrative matters. School principals need to be encouraged to register for courses such as Public Administration. An arrangement should also be made with the South African Management and Development Institute (SAMDI) for courses such as Provisioning Administration Standard (PAS), financial Management System (FMS) and PERSAL. The training of principals in these courses should make the supervision and management of administrative work at school possible. This should also lead to proper training and development of school clerks by the School Principal. Consideration should also be given to the training of deputy principals in these courses in preparation for the management of human resources and material resources. The MDE could also consider making it compulsory for all school principals and their deputies to attend management courses after an arrangement has been made with SAMDI.

The training of both school principals and school clerks in personnel evaluation should be given priority. The empirical study has revealed that the major cause for demotivation is the lack of knowledge of the evaluation system by the principals and the clerks alike. Training on personnel evaluation should be linked to other forms of training for the development of the school clerk. It should also be a practice to write annual reports for employees in order to assess whether employees are performing to the required level.

6.2.3 Personnel evaluation

It is recommended that personnel evaluation be undertaken on an annual basis for school clerks. Both the school principals and the school clerks must be trained for successful evaluation to take place. The District Office should carry the responsibility of training both the school principals and the school clerks under its jurisdiction. After training has been conducted for both groups, consideration should be given to the training of deputy principals who are normally responsible for the management of the school in the absence of the School Principal.

To eliminate delays associated with personnel evaluation, the evaluation committee should be established at the circuit level. The role of this committee should be to make sure that employees are evaluated as objectively as possible by the supervisor. The evaluation committee at the circuit should comprise of the Circuit Manager as the chairperson, nominated school principals falling under the same Circuit and one official from the Circuit Office who is the head of administration.

The second committee should be the moderating body established at the District Office. This committee should comprise of the head of the professional services at the district office to act as the chairperson of the committee. All circuit managers in the same district office should form part of the committee together with the head of the administrative component at the District Office. The District Manager should be delegated with authority to take a final decision on the recommendations of the moderating body. This arrangement may lead to the issuing of results on time, which may lead to an increase in the morale of the school clerks. It is also important that the MDE inform both the school principal and the school clerks that evaluation does not necessarily lead to promotion all the time.

6.2.4 Management of human and material resources

The management and supervision of the school clerk should rest with the school principal. The organizational structure should facilitate communication between the principal, the clerk with the rest of the teaching personnel. The line of authority at the school should be respected in order to ensure that in the absence of the school principal, the deputy principal takes the responsibility of supervision of the school clerk. Regular meetings between the School Principal and the school clerk should take place. The school clerk should also be involved in meetings of the staff where the objective of the school is discussed and plans to achieve such an objective are formulated.

The SMT should be responsible for the drawing-up of estimates for the school. It is proposed that the SMT should comprise of the School Principal as a chairperson, the deputy principal, the heads of departments and the school clerk. The inclusion of the school clerk in the SMT meetings will enable the coordination of the administrative support service to be linked to the main objective of the institution. It will also facilitate the process of purchasing goods and services as the school clerk will know in advance and make the necessary preparations in-terms of the budget. The school clerk should be responsible for the compilation of the monthly cash flow reports to be submitted to the Circuit office and finally to the District Office. The School Principal should sign the cash flow report before it is submitted to the Circuit Office.

Although the School Principal remains accountable for the management of material resources at school, the school clerk should be delegated with the responsibility to manage material resources such as the stores items. The school clerk should do this by keeping the register for both consumable materials and equipment. The issuing of consumable stores should be the responsibility of the school clerk in consultation with the head of department responsible. The control of material resources such as equipment and consumables should be in line with the requirements of the regulations as applicable at the circuit and district offices. The need for stock-taking by officials from the MDE'S head office should be curtailed to that of inspection and the school clerk to do stock taking once every year.

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CONFIDENTIAL

REPUBLIC OF SOUTH AFRICA

QUARTERLY REPORT: OFFICER ON PROBATION

N.B.—This form should be filled in immediately on expiry of the prescribed period and *in the light of the comments contained in the Supervisor's Report (Z 250)*. Thereafter it should be shown to and signed by the officer on probation, and forwarded to the Head of the Department through the usual channels.

Name..... Identity No.

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Rank..... Period Report No.

Insert X in appropriate column	Satisfactory	Unsatisfactory	(xi) Is the officer in your view placed correctly? If not, what do you propose?
(i) Attendance		
(ii) Zeal		
(iii) Thoroughness and accuracy		
(iv) Willingness to learn		
(v) Conduct		
(vi) Friendliness and helpfulness			(xii) Do you anticipate that the officer upon expiry of his/her probationary period will be suitable for a permanent appointment?
(vii) General progress			
(viii) Language proficiency measured against post requirements		
(ix) Sobriety		
(x) Appearance and dress		
		

DETAILS OF THE TRAINING PROGRAMME TO WHICH THE OFFICER HAS BEEN SUBJECTED DURING THE REPORTING PERIOD AND THE PROGRESS WHICH HE/SHE MADE

- 3.3 The head of the office/directorate/division
Part D should be completed by the head of the office/directorate/division, if he himself did not act as reporting officer.
- 3.4 Moderating body
The column marked **of Part C and Part E should be completed by the moderating body (Staff Advisory Committee/Internal Committee/individual person).
- 3.5 Head of Department
Part F should be completed by the head of department or the officer delegated by him.

4. Cut-off points in respect of the various categories for merit awards

Category	Production units	Supervisors
A	36-40	54-60
B	33-35	50-53

N.B. Over and above the above-mentioned assessment the officers/employees should obtain assessments of at least "average" (2 points) under any one of the factors in the questionnaire.

5. Procedure to be followed

5.1 Applicability of the questions in Part C

Factor	Production units	Supervision
Knowledge and insight	1 - 4	1 - 4
Production	5 - 7	5 - 7
Interpersonal relations	8 - 10	8 - 10
Leadership	-	11 - 15
Total number of questions	10	15

5.2 Evaluation by reporting officer (Part C)

- 5.2.1 Read the applicable questions in Part C carefully and choose from the answers given the one that best reflects the person's proven sustained achievements. Indicate the rating chosen by marking the appropriate figure in the column marked *with a cross. Potential should be disregarded in the assessment.
- 5.2.2 Incidents/reasons substantiating the assessments should be given (by factor) in such a way that it supports the rating in respect of the applicable questions.
- 5.2.3 Add the numerical values of the ratings and enter the total in the appropriate space in Part C. Convert the total score into a category classification (vide paragraph 4 supra) and enter it in the space marked "merit assessment".
- 5.2.4 Sign and date the report.
- 5.2.5 Then submit the report to the head of the office, directorate or division.

5.3 Head of the Directorate (Part D)

Indicate to what extent you concur/do not concur with the assessment of the reporting officer and submit the report to the moderating body.

5.4 Moderating body (Parts C and E)

- 5.4.1 Moderate the assessments of the various reporting officers against the incidents/reasons substantiating the assessments, as well as by horizontal comparison. Should there be any doubt, moderating bodies are free to call for further evidence.
- 5.4.2 Complete the assessment in respect of the questions by marking the appropriate figure in the column marked**, in part C, with a cross.
- 5.4.3 Add the numerical values of the assessments and enter the total in the appropriate space in Part C. Convert the total score into a category classification (vide paragraph 4 supra) and enter it in the space marked "merit assessment".
- 5.4.4 In cases where the assessment of the moderating body differs from that of the reporting officer, the moderating body should give reasons for its scoring in Part E.
- 5.4.5 The chairman of the moderating body signs and dates the report.
- 5.4.6 Forward the report to the departmental staff division.

5.5 Departmental staff division

5.5.1 Check reports for correctness and completeness.

5.5.2 Submit the report to the head of the department, or the officer delegated by him, for final decision.

5.6 Head of Department (Part F)

5.6.1 The head of department, or the officer delegated by him, may without giving reasons approve/refuse the grant of the merit award if his decision accords with the merit assessment of the moderating body.

5.6.2 If, however, a head of department differs with the moderating body on the assessment of an officer/employee, he must consult with the moderating body with a view to settling differences of opinion.

If it is not possible to settle such differences, the head of department takes the final decision and gives reasons for his decision in Part F. All the cases where there are differences of opinion of the kind referred to above should be dealt with by the head of department personally or, if he is not available, by his deputy.

C. ASSESSMENT TABLE

NB:

1. A typed copy of the officer's duty sheet must accompany the questionnaire.
2. Each question must be motivated separately.
3. Questions must be answered point by point serialim on separate typed sheets.
4. Incidents/Motivation must -

(a) be short and to the point, but must support the marks allocated in regard of each question;

(b) not contain generalized statements, but genuine incidents of value.

Factor	Questions	Rating	
		Reporting officer*	Moderating body*
Knowledge and insight	1. To what extent does his work performance show that he learns with ease and is quick to grasp matters?		
	His performance shows this to an exceptional degree	4	4
	His performance shows this to a greater extent than that of his peers	3	3
	His performance is no better or worse than that of most of his peers	2	2
	His performance shows a lesser degree of this than that of most of his peers	1	1
	His performance does not show this at all	0	0
	2. To what extent does he succeed in gaining knowledge of his work and/or related spheres of activity, and in applying this knowledge judiciously?		
	He succeeds excellently	4	4
	He succeeds better than most of his peers	3	3
	He is not better or worse than most of his peers	2	2
	He is incapable of doing this	1	1
		0	0

Factor	Questions	Rating	
		Reporting officer*	Moderating body*
	<p>3. To what extent does he approach his task systematically and carry it to completion through independent and efficient thinking?</p> <p>Exceptional</p> <p>Better than satisfactory</p> <p>Satisfactory</p> <p>Less than satisfactory</p> <p>Poor</p>	<p><input type="text" value="4"/></p> <p><input type="text" value="3"/></p> <p><input type="text" value="2"/></p> <p><input type="text" value="1"/></p> <p><input type="text" value="0"/></p>	<p><input type="text" value="4"/></p> <p><input type="text" value="3"/></p> <p><input type="text" value="2"/></p> <p><input type="text" value="1"/></p> <p><input type="text" value="0"/></p>
	<p>4. To what extent does he success in identifying, understanding and timeously solving problems in his work?</p> <p>Exceptional</p> <p>Better than satisfactory</p> <p>Satisfactory</p> <p>Less than satisfactory</p> <p>Very poor</p>	<p><input type="text" value="4"/></p> <p><input type="text" value="3"/></p> <p><input type="text" value="2"/></p> <p><input type="text" value="1"/></p> <p><input type="text" value="0"/></p>	<p><input type="text" value="4"/></p> <p><input type="text" value="3"/></p> <p><input type="text" value="2"/></p> <p><input type="text" value="1"/></p> <p><input type="text" value="0"/></p>
Production Shortcuts	<p>5. To what extent does he organise his work in order to obtain maximum productivity with the minimum of time and energy?</p> <p>Excellent</p> <p>Better than satisfactory</p> <p>Satisfactory</p> <p>Less than satisfactory</p> <p>Not at all</p>	<p><input type="text" value="4"/></p> <p><input type="text" value="3"/></p> <p><input type="text" value="2"/></p> <p><input type="text" value="1"/></p> <p><input type="text" value="0"/></p>	<p><input type="text" value="4"/></p> <p><input type="text" value="3"/></p> <p><input type="text" value="2"/></p> <p><input type="text" value="1"/></p> <p><input type="text" value="0"/></p>

Factor	Questions	Rating	
		Reporting officer*	Moderating body*
	<p>6. How can his production be described, taking into consideration his normal work place and the quality of his work?</p> <p>Exceptional</p> <p>Better than satisfactory</p> <p>Satisfactory</p> <p>Less than satisfactory</p> <p>Not at all</p>	<p><input type="text" value="4"/></p> <p><input type="text" value="3"/></p> <p><input type="text" value="2"/></p> <p><input type="text" value="1"/></p> <p><input type="text" value="0"/></p>	<p><input type="text" value="4"/></p> <p><input type="text" value="3"/></p> <p><input type="text" value="2"/></p> <p><input type="text" value="1"/></p> <p><input type="text" value="0"/></p>
	<p>7. How conscientious is he? (Does he give his immediate attention to his work in general or does he need to be prodded, and to what extent does he voluntarily devote his time and energy, even after hours, to his work if his work requires this?)</p> <p>He is extremely conscientious</p> <p>He displays a greater sense of duty than most of his peers</p> <p>He displays the same sense of duty as most of his peers</p> <p>He is less conscientious than most of his peers</p> <p>He often neglects his duty</p>	<p><input type="text" value="4"/></p> <p><input type="text" value="3"/></p> <p><input type="text" value="2"/></p> <p><input type="text" value="1"/></p> <p><input type="text" value="0"/></p>	<p><input type="text" value="4"/></p> <p><input type="text" value="3"/></p> <p><input type="text" value="2"/></p> <p><input type="text" value="1"/></p> <p><input type="text" value="0"/></p>
Interpersonal relations	<p>8. How effective does his nature (in other words, friendliness, courtesy, loyalty, etc.) make him in the performance of his duties?</p> <p>Exceptionally effective</p> <p>More effective than most of his peers</p> <p>No better or worse than most of his peers</p> <p>Not very effective</p> <p>Not effective at all</p>	<p><input type="text" value="4"/></p> <p><input type="text" value="3"/></p> <p><input type="text" value="2"/></p> <p><input type="text" value="1"/></p> <p><input type="text" value="0"/></p>	<p><input type="text" value="4"/></p> <p><input type="text" value="3"/></p> <p><input type="text" value="2"/></p> <p><input type="text" value="1"/></p> <p><input type="text" value="0"/></p>

Factor	Questions	Rating	
		Reporting officer*	Moderating body*
	<p>9. How can his attitude towards others (his seniors, peers, juniors and the public) be described and to what extent does he perform effectively in a group, if applicable?</p> <p>Exceptionally good</p> <p>Markedly better than satisfactory</p> <p>Satisfactory</p> <p>Unsatisfactory</p> <p>Poor</p>	<p style="text-align: center;">4</p> <p style="text-align: center;">3</p> <p style="text-align: center;">2</p> <p style="text-align: center;">1</p> <p style="text-align: center;">0</p>	<p style="text-align: center;">4</p> <p style="text-align: center;">3</p> <p style="text-align: center;">2</p> <p style="text-align: center;">1</p> <p style="text-align: center;">0</p>
	<p>10. To what extent does his conduct attest to a healthy balance between asserting his own opinion and amenability to logical arguments?</p> <p>His conduct attests to an exceptionally healthy balance between asserting his own opinion and amenability to logical arguments</p> <p>His conduct attests to a better balance between asserting his own opinion and amenability to logical arguments than most of his peers</p> <p>His conduct attests no better or worse a balance between asserting his own opinion and amenability to logical arguments than most of his peers</p> <p>His conduct attests to a poorer balance between asserting his own opinion and amenability to logical arguments than most of his peers</p> <p>His conduct attests to no balance between asserting his own opinion and amenability to logical arguments than most of his peers</p>	<p style="text-align: center;">4</p> <p style="text-align: center;">3</p> <p style="text-align: center;">2</p> <p style="text-align: center;">1</p> <p style="text-align: center;">0</p>	<p style="text-align: center;">4</p> <p style="text-align: center;">3</p> <p style="text-align: center;">2</p> <p style="text-align: center;">1</p> <p style="text-align: center;">0</p>

Factor	Questions	Rating	
		Reporting officer*	Moderating body*
Leadership	11. How successful is he in the optimum utilisation of his subordinate(s) according to his/her/their abilities?		
	Exceptionally successful	<input type="text" value="4"/>	<input type="text" value="4"/>
	Better than satisfactory	<input type="text" value="3"/>	<input type="text" value="3"/>
	Satisfactory	<input type="text" value="2"/>	<input type="text" value="2"/>
	Less than satisfactory	<input type="text" value="1"/>	<input type="text" value="1"/>
	Totally unsuccessful	<input type="text" value="0"/>	<input type="text" value="0"/>
	12. To what extent does he inspire his subordinate(s)?		
	To a particularly high degree	<input type="text" value="4"/>	<input type="text" value="4"/>
	To a greater extent than most supervisors	<input type="text" value="3"/>	<input type="text" value="3"/>
	To the same extent as most supervisors	<input type="text" value="2"/>	<input type="text" value="2"/>
	To a lesser extent than most supervisors	<input type="text" value="1"/>	<input type="text" value="1"/>
	To a very slight extent	<input type="text" value="0"/>	<input type="text" value="0"/>
	13. How successful and tactful is he in exercising authority over his subordinate(s)?		
	Extremely successful and tactful	<input type="text" value="4"/>	<input type="text" value="4"/>
	More successful and tactful than the average supervisor	<input type="text" value="3"/>	<input type="text" value="3"/>
	Average	<input type="text" value="2"/>	<input type="text" value="2"/>
	Less successful and tactful than the average supervisor	<input type="text" value="1"/>	<input type="text" value="1"/>
	Very unsuccessful and tactless	<input type="text" value="0"/>	<input type="text" value="0"/>

Factor	Questions	Rating	
		Reporting officer*	Moderating body*
	<p>14. To what extent does he provide informal and formal training for his subordinate(s)?</p> <p>To an exceptional extent</p> <p>Better than most supervisors</p> <p>To the same extent as most supervisors</p> <p>Poorer than the most supervisors</p> <p>Not at all</p>	<p style="text-align: center;">4</p> <p style="text-align: center;">3</p> <p style="text-align: center;">2</p> <p style="text-align: center;">1</p> <p style="text-align: center;">0</p>	<p style="text-align: center;">4</p> <p style="text-align: center;">3</p> <p style="text-align: center;">2</p> <p style="text-align: center;">1</p> <p style="text-align: center;">0</p>
	<p>15. What is the quality of his continuous evaluation of his subordinate(s) and the feedback of evaluation results?</p> <p>Exceptionally good</p> <p>Above average</p> <p>Average</p> <p>Below average</p> <p>Very poor</p>	<p style="text-align: center;">4</p> <p style="text-align: center;">3</p> <p style="text-align: center;">2</p> <p style="text-align: center;">1</p> <p style="text-align: center;">0</p>	<p style="text-align: center;">4</p> <p style="text-align: center;">3</p> <p style="text-align: center;">2</p> <p style="text-align: center;">1</p> <p style="text-align: center;">0</p>
	Total points		
	Merit assessment (category classification)		

REPORTING OFFICER

DATE

/merit-4

D. REMARKS BY DIRECTOR/ACTING DIRECTOR OR HIGHER

.....
.....
.....
.....

.....

SIGNATURE RANK DATE

E. MODERATING BODY

Indicate whether the moderating body agrees with the merit assessment of the reporting officer.

YES	NO
-----	----

If not -

(a) which merit assessment is suggested:

(b) give reasons for suggestion:

.....
.....
.....
.....

.....

CHAIRMAN: MODERATING BODY DATE

F. DECISION OF HEAD OF DEPARTMENT

Merit award approved/not approved.

Comments:

.....
.....
.....
.....
.....

.....

SIGNATURE DATE

PERSONNEL ASSESSMENT QUESTIONNAIRE

A. Personal particulars (To be completed by the Personnel Division)

I.D. number:

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Date of birth:

--	--	--	--	--	--	--	--	--	--

Security clearance:

N/A.	R	C	S	TS
------	---	---	---	----

Surname.....

First name(s).....

Grading..... Rank.....

Entry date to the rank or grading..... Dept.....

Division..... Stationed at.....

N.B.: B.1-7 must be completed by the officer/employee. B.4 must be confirmed by the supervisor.

B.1 Condition of health.—Do you experience health problems and/or are you physically handicapped? Yes No

If "Yes", briefly describe the nature of your problems.....

B.2 Placing

Are you placed correctly in your present department?

Yes	No
-----	----

Are you placed correctly in your present field of work or occupational class?

Yes	No
-----	----

If "No"—

(a) where do you wish to be placed? Dept..... Field of work or Occupational class.....

(b) give reasons.....

Irrespective of whether you are placed correctly or not, to which department(s) and/or type of job(s) or occupational class(es) will you accept a transfer? (Order of preference).

Department..... Field of work or Occupational class.....

B.3 Transferability

Are you transferable to another station?

Yes	No
-----	----

Is there a particular station where you do not wish to be placed?

Yes	No
-----	----

If "Yes", specify.....

B.4 Feedback on performance/Evaluation results (This item must be completed in consultation with your supervisor)

Are you in your present rank or grading informed of—

(a) your continued work performance? Yes No

(b) your promotability assessment? Yes No *N/A

Confirmed by reporting officer or supervisor

* (In the case of a first assessment in a rank or grading)

.....
Signature of supervisor or reporting officer

.....
Date

B.5 Educational Qualifications

(a) Highest standard passed at school:	Year:	
(b) Post-school qualifications	Year	Major subjects
.....
.....
.....

B.6 Previous Experience in the Public Service

From	To	Department	Occupational class
.....
.....
.....
.....

B.7 Declaration

I declare that the information above is true and correct; that I am aware that it will be noted in the records and I undertake to notify the personnel division of any changes, should they occur.

.....
Signature

.....
Date

the officers' or employee's language proficiency of such standard that he or she is able to perform his or her duties satisfactorily?

YES
NO

protect the prestige and interests of his or her Department.

(where applicable.)

of state property or state monies.

(Additional tasks.)

common sense and aptitudes in his or her work.

independently.

and.

(by superiors/peers/seniors/public).

to the public.

in seeking for other points of view.

to identify needs and take applicable steps.

Score Allocation:

1. Performance is poor
2. Performance does not conform to the normal requirements
3. Performance conforms to the normal requirements
4. Performance is noticeably better than the normal requirements
5. Performance is considerably better than the normal requirements
6. Performance is exceptional

*Reporting Officer						Assessing Authority
1	2	3	4	5	6	

1.1						
1.2						
1.3						
1.4						
1.5						

1.6						
1.7						
1.8						

1.9						
1.10						
1.11						
*Sub-total						* □

2.1						
2.2						
2.3						
2.4						
2.5						
*Sub-total						* □

3.1						
3.2						
3.3						
3.4						
*Sub-total						* □
Final score: Production units						* □

4.1						
4.2						
4.3						
4.4						
4.5						
*Sub-total						* □

Final score: Supervisors and ALL persons in promotion ranks

* □

Secondary School

1999 PROJECTED BUDGET

Discussion Document : Recommendations, Sugestions at Stakeholders Meeting

Sports

No	Details	Amount
1	Affiliation Fees	3000.00
2	Award Prizes (sports)	3000.00
3	Awards Cash (zonal , etc)	1500.00
4	Transport	1500.00
5	Refreshments	4000.00
6	Equipment	6500.00
7	Maintenance of Sports Areas	2000.00
8	Coaching	3000.00
9	Sports Kit	2000.00
10	Tent Hire	500.00
11	First Aid	500.00
	TOTAL	27500.00

Academic

1	Trophies for academic achievement/s	3000.00
2	Awards Day Books	1000.00
3	Reference Books	3000.00
4	Career Talks	1000.00
5	Life Skills Talks eg Drugs, AIDS, etc	2000.00
6	Guest Speakers – Motivational Talks	1500.00
7	Hire of Hall	1000.00
8	Workshops	500.00
9	Magazines for Library	500.00
10	Consultants : Auditors	1000.00
11	Affiliation Fees -English	500.00
12	Refreshments – Parents Day	1000.00
		16000.00

Administration

1	Files and File Leaves	1000.00
2	Printer ink / Ribbons	1000.00
3	Photocopy Toner	5000.00
4	CD Ink and Masters	10000.00
5	Staplers	500.00
6	Staples	200.00
7	Colour Duplicating Paper	1000.00
8	Transport : Official Reasons	1000.00
9	Repairs to CD Machine and Computer	3500.00
10	Post Office Box Rental and Stamps	500.00
11	Telephone Rental and Official Use	500.00
	TOTAL	24200.00

Charitable Organisations and Donations

1	Saaberie Chisty	300.00
2	Jiswa Disabled	300.00
3	Caretakers	350.00
4	Baitoon Nur	500.00
5	Flowers - Funerals	500.00
	TOTAL	1950.00

SECONDARY SCHOOL : BUDGET 2000

ANNEXURE E

Detail	Total	Eng	Agr	Maths	Science	Tech	Comm.	Human	Maintenance	Admin	Gen.Stock
Building	120,000.00								120,000.00		
Maintenance										72,000.00	
Security	72,000.00								96,000.00		
Water S	96,000.00										
Electricity									15,000.00		
Grounds	15,000.00									5,000.00	
Telephone	5,000.00										
Stationary	100,000.00										100,000.00
Text Books	294,785.00	114,785.00	25,000.00	35,000.00	35,000.00	70,000.00	15,000.00				294,785.00
Metal work	19,920.00										19,920.00
Motor	40,885.00										40,885.00
Mechanics											
Electricians	23,700.00										23,700.00
Woodwork	26,742.50										26,742.00
Technical	31,000.00										31,000.00
Civils											
Home	6,339.00										6,339.00
Economics											
Computers	130,000.00					130,000.00					
Resource	11,000.00						3,000.00	8,000.00			
Material											
Typewriters	35,000.00										35,000.00
Typewriter	5,500.00								5,500.00		
Ribbons											
Additional	318,500.00	45,500.00	45,500.00	45,500.00	45,500.00	45,500.00	45,500.00	45,500.00			
Teacher											
Sports	5,000.00										5,000.00
Sports	1,200.00									1,200.00	
Affiliation											
Annual	3,000.00									3,000.00	
Athletics											
Hours	3,000.00									3,000.00	
Evening											
Refreshments	6,000.00									6,000.00	
Transport	5,000.00									5,000.00	
TV'S S Videos	20,000.00										20,000.00
Petty Cash	5,000.00									5,000.00	