Teachers' understandings of performance management in a collaboration school in the Western Cape

BY

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DECLARATION

I, Bridget-ann Mullins, declare that the content of this thesis is my own unaided work. I have used the Harvard convention for citation and referencing and have ensured that the work of other people, who have contributed to this thesis, has been attributed, cited, and referenced. Furthermore, this work represents my own opinions and not necessarily those of the Cape Peninsula University of Technology.

25 February 2024

Signed   Date

ACKNOWLEDGEMENTS

DEDICATION

I offer this research as a dedication to all my peers who undertake post-graduate studies, and to the higher education establishments that uphold continuous research in the realm of education in South Africa, thereby steering advancements in the sector.

Additionally, I extend this dedication to my wife and son, Eleanor and Jamie, for serving as the focal point of my world and instilling in me the bravery to confront any challenges life presents.

ABSTRACT

The Western Cape Education Department in South Africa has initiated an educational public-private partnership (PPP) known as the Collaboration Schools Programme. This study aimed to investigate the collaboration school initiative and assess its potential to drive meaningful educational transformation. It focused on the operationalisation of governance structures, particularly the performance management of teachers within collaboration schools and its impact on them.

The study utilised an interpretive philosophy and a qualitative case study approach. Semi-structured interviews with teachers, school management, and school governing body representatives were used to gather insights on how teachers perceive performance management within the collaboration school and how it impacts their professional roles.

Findings suggest that teachers' autonomy is curtailed due to confusion and compliance constraints as they navigate two distinct governance systems. This was exacerbated by additional challenges, including contract management and transparency. Findings also indicate that teachers experienced feelings of powerlessness and injustice due to the school's excessive focus on data and student results. Nevertheless, some teachers discovered a sense of belonging through shared reflections.

The study synthesis highlighted alignment with performativity, where neoliberal philosophy suggests that competitive market forces should shape education institutions. The study recommends the creation of policies and systems to improve the balance between accountability and professional autonomy so that school leaders and teachers can act with clarity to promote inclusive educational practices. The study contributes to the information on collaboration schools and adds to the knowledge of the influence of neo-liberalism within educational structures. In doing so, it aids in providing clarity and contributes to how education reforms, such as PPP, can use governance to ensure meaningful transformation in post-apartheid South Africa.

Keywords: educational public-private partnership, collaboration school, performance management, performativity, neoliberalism

LIST OF ABBREVIATIONS AND ACRONYMS

CMO	Charter Management Organisations
CNE	Christian National Education
COVID	Corona Virus Disease
DDD	Data Driven Dashboard
ELRC	Education Labour Relations Council
GERM	Global Education Reform Movement
HOD	Head of Department
HR	Human Resources
IQMS	Integrated Quality Management System
ISPFTED	Integrated Strategic Planning Framework for Teacher Education and Development
MAT	Multi-Academy Trusts
MBO	Management by Objectives
NDA	Non-Disclosure Agreement
NP	National Party
NPO	Non-Profit Organisation
NQT	Newly Qualified Teacher
PBA	Performance-Based Accountability
PPP	Public-Private Partnerships
QMS	Quality Management System
SADTU	South African Democratic Teachers Union
SASA	South African Schools Act
SGB	School Governing Body
SMT	Senior Management Team
SOP	School Operating Partner
WC	Western Cape
WCED	Western Cape Education Department

TABLE OF CONTENTS

LIST OF FIGURES

LIST OF TABLES

CHAPTER ONE
INTRODUCTION

1.1 Introduction

Despite educational public-private partnerships (PPPs) have limited recognition in South Africa (SA), their presence has been longstanding in international educational reform discourse. The study centres on the experiences of teachers within this new educational landscape, particularly in the Western Cape (WC). The legislation, established by the Western Cape Education Department (WCED), to govern these PPPs designates them as collaboration schools. Teachers within collaboration schools encounter new concepts and challenges distinct from those in standard public schools. This research aimed to garnish an understanding of the perceptions of teachers on performance management within these new South African educational reform models, specifically, how performance management is operationalised within collaboration schools and its effects on teachers.

1.2 Background and Study Rationale

Conversations of PPPs in education have risen in popularity amongst international and development institutions dealing with educational matters. The attraction to the model centres on the opportunity for the government to expand its education systems, to correct inefficiencies within the public delivery of education and to mobilise new resources more efficiently and effectively (Verger & Moschetti, 2017b:4).

In November 2015, the Western Cape Government, through the Minister of Education, Debbie Shäfer, announced the launch of a collaboration school pilot programme set to begin in 2016. The collaboration school model was to be based on the United Kingdom's (UK) Academies, an educational public-private partnership.

Education governance is not an abstract concept. An exact definition of good governance is debatable, but the consequences of bad governance are easily observable. Teachers' commitment and the quality of teaching in a school, strongly influence a school's efficiency. Effective performance management systems bring many benefits such as informing policy, elevating quality, and promoting equity. Conversely, weak governance and performance management systems produce the opposite effect (Global EFA, 2008:6).

Teacher performance management systems often emphasise performance measurement and

appraisal. Presently, SA employs the Quality Management Standard (QMS) for education appraisal, integrating performance measurement and appraisal into teacher evaluations. Williams (2005, cited by Tseke, 2010:20) contends that performance is shaped by a range of factors, including motivation, highlighting the interconnectedness of these elements. Hence, examining teacher performance must consider the effects of the performance management system.

On November 22nd, 2018, the WCED published the Western Cape Provincial School Education Bill Amendment Act (No. 4, 2018). This bill permits the School Operating Partner (SOP) to hold a 50% representation on the School Governing Body (SGB) and oversee curriculum delivery and staff employment at the schools.

In collaboration schools, the SOP, an outsourced NPO management contractor, would oversee the recruitment of new staff and the performance management of both new and existing personnel. Collaboration schools continue to receive financial support for salaries from the WCED. Additionally, the operating partners of collaboration schools hold a 50% representation on the SGB. However, Section 23 of the South African Schools Act no. 84 (SA, 1996b) stipulates a parental majority on the SGB. These shifts in SGB structure and management outsourcing reshape the educational governance landscape of collaboration schools compared to conventional public schools.

The collaboration school model has prompted diverse perspectives and multiple critiques. David Harrison of the DG Murray Trust advocates for the project's potential to provide better education to marginalised groups (Harrison, 2017a).

Following legislative amendments, the pilot phase of the collaboration school model concluded after two years, with the reform adopted by the WCED. Yet, no publicly accessible evaluation report on the model has been released to date. The documentation and understanding of governance changes in collaboration schools remain inadequate. Currently, the influence of the new governance structure on teachers within collaboration schools remains uncertain, and teachers' voices in this reform space are lacking. By investigating teachers' performance management and its impact, this study aimed to shine a light on the efforts within the collaboration school initiative and investigated the model's potential to facilitate meaningful educational change.

1.3 Problem Statement

The success of educational reform hinges on the commitment of teachers, who are at the forefront of implementing initiatives such as the collaboration school model. Despite this, research on education PPPs frequently fails to include the voices and acknowledge the crucial role played by teachers. The alterations in collaboration school governance structures, including performance management and hiring authority, directly impact teachers working within these institutions. Yet, limited information exists regarding how these teachers have responded to these governance changes. Given the consequential influence of school governance, understanding the motivations and performance of teachers in collaboration schools requires empirical insights into the dynamics of performance management within these schools, including teachers' experiences and the subsequent effects on their professional roles. This study aims to offer empirical insights into governance within a collaborative school setting, with a focus on teachers as the primary unit of analysis. By doing so, it endeavours to incorporate the perspectives and voices of teachers into the ongoing debates surrounding education reform.

1.4 Overview of the Study

The study explored teacher experiences of performance management within a public-private school system, known as the collaboration schools model. Given teachers' essential role as front-line drivers of educational reforms, the area of teacher governance in collaboration schools remains a neglected area of study. Therefore, the research objectives included examining how teachers within collaboration schools perceived the new governance framework, particularly its impact on performance management, and how these dynamics influenced teachers.

Research aims and objectives:

- To investigate teachers' experiences of performance management in collaboration schools.

- To understand the views of teachers on how performance management is operationalised within the collaboration school.

- To understand the effects performance management has on teacher motivation and teaching and learning collaboration schools.

Therefore, the main research question is:

What are teachers' experiences of the performance management system in collaboration schools?

The following guiding sub-questions are:

1. What are teachers' views of how performance management is operationalised within the school?

2. How do teachers' perceptive of the effects of performance management at their schools?

This study adopted a constructive ontological stance. As is primarily grounded in interpretivist stance so an interpretive paradigm was employed. Employing a qualitative research approach, the study considered phenomena as socially constructed entities, shaped through interactions between individuals, their surroundings, and the wider world. This approach resonated with the study's focus on understanding the experiences of teachers working in collaboration schools, specifically within the context of performance management.

A case study design was used to provide intensive, holistic, deep descriptions and analysis of the study phenomena. The study used semi-structured interviews as the main data collection process with participant teachers as the unit of analysis selected through purposive sampling. The data underwent extensive thematic processing to determine the findings, synthesis, recommendations, and conclusion.

1.5 Concept Clarification

The concepts below explain the topics used in this study. While these explanations provide a foundational understanding, the subsequent literature review, contextual and other chapters delve into greater detail, definition, and comprehension.

Public-private partnerships (**PPPs)** do not seem to have a standard definition that is comprehensive across sectors. Feldman (2020:2) provides an insightful explanation by describing PPPs as supporting agreements between institutions that span both the private and public sectors. These agreements focus on infrastructure and service delivery, encompassing shared responsibilities, risk-sharing, and decision-making, and often entail long-term

commitments. Educational PPPs, including well-known examples such as the US Charter Schools and UK academies, illustrate this concept. The literature review chapter expounds on PPPs, while this basic understanding serves to introduce and clarify the study's scope.

Collaboration schools are a type of PPP within education operating in the WC in SA. These no-fee schools, serving local communities, are part of the public schooling system and exist in two forms: they are either integrated into an existing struggling public school or established as new entities. In both cases, school management is outsourced to a non-profit organisation known as the SOP, which receives management funds from the WCED. A donor body oversees the SOP and provides additional funding towards the schools. In new schools, the SGB assumes the role of employer for all staff, with the SOP holding majority voting rights in the SGB. In existing schools, previously WCED-employed teachers remain so, while vacant or new posts are SGB-appointed. The context chapter dissects the collaboration school model and its parameters in more detail.

School Operating Partner/Operating Partner (**SOP)** is a non-profit organisation responsible for the management, daily operations and ensuring improvement of the schools' performance and student results. The SOP acts as an intermediator between the state and the funder group. It is responsible for operational support, resources, community representation, staff appointment, financial management and performance management, and professional development of the staff. Further details on the functions of the SOPs are presented within the body of the thesis.

School Governing Body (SGB) is a statutory body mandated by the South African Schools Act 84 of 1996 (SA, 1996b). It includes parents, teachers, non-teaching staff, the principal, and learners (in high schools). The SGB collectively addresses school governance, seeking to enhance efficiency, represent the community, and foster the well-being of all stakeholders, thereby enriching teaching and learning. Co-opted members, without voting rights, can also participate, while parents constitute the majority of voting members, in adherence to SASA.

De Jure and De Facto are legal concepts that often apply to the state of affairs within politics, leadership and business practices. De jure refers to what is recorded in the law, policies, and legislation of the law; whereas de facto refers to what happens in practice or reality. De facto practices come into being when there is sufficient collective endorsement of a particular practice, or when a shared understanding of a situation is conveyed within a group as an established reality (Metych, 2023:1). In this study, the SGB is the de jure employer of teachers within collaboration schools, much like the practice that occurs in other fee-charging schools.

However, the SOP is a de facto employer as shown in the finding chapter, for it is commonly understood as an established reality in the school that the teacher's employment contracts were secured through the relationship with the SOP. Evidence of this condition is presented in Chapter Five as part of the findings.

Performance management can be seen as a process wherein organisational managers oversee staff performance. It involves planning, directing, and supervising staff actions (Mosoge & Pilane, 2014:6). Primarily, performance management aims to improve communication about organisational goals and plot employee performance against these objectives. The shared understanding of goals, purpose, and challenges enhances cohesion. The terms "performance appraisal" and "performance evaluation" are used interchangeably in this study to denote performance management systems within the broad context of the definition. The detailed exploration of performance management is elaborated upon in the literature review chapter.

Neoliberalism is a philosophy that originates from new public management, where market-based systems and forces, such as competition, impact public goods, services, and institutions. In this framework, all aspects of education are viewed as input-output parts of a method that competes for clients (Powell & Parkes, 2019:9). The success of education is measured solely by the numbers, and performance management is used to identify weaknesses in the process according to the data. This concept is explained here for better understanding, and more information is available in the literature review, with evidence of this situation highlighted in the finding and synthesis chapter.

1.6 Structure of the Thesis

Chapter One: Introduction and Background

Chapter One introduces the study and provides background and insights into the central concepts explored in the thesis. It outlines the problem statement, identifies research gaps, and establishes research aims, objectives, and questions.

Chapter Two: Contextualisation of the Study

This chapter offers an overview of the political, social, and economic landscape in SA. It addresses crucial elements, such as apartheid-era education, post-apartheid policy development, and their relevance to the study's focal points – performance management, the

South African Schools Act, and the rationale behind collaboration schools' legislation.

Chapter Three: Literature Review

This chapter conducts an in-depth examination of pertinent literature that shaped the study. The review encompasses four key sections: an Overview of PPP Models, Governance and Performance Management, Effects of Performance Management, and Performativity. This chapter culminates in a visually depicted conceptual framework that stems from the literature reviewed.

Chapter Four: Methodology

Chapter Four elucidates the research philosophy, design, and methodologies underpinning data collection. Addressing the study's trustworthiness, the chapter encompasses ethical considerations and acknowledges study limitations.

Chapter Five: Finding and Discussion

Chapter Five unpacks the study's findings, systematically delving into each research question that guides the study. Findings are analysed and discussed within the framework of emergent themes arising from data analysis.

Chapter Six: Summary and Recommendations

The final chapter concludes the thesis, offering a comprehensive summary of the research. It contextualises and synthesises the study, highlighting connections to overarching themes from the literature review and context chapters. Furthermore, the chapter outlines recommendations for future research endeavours and emphasises the research's contributions.

Chapter one offers an overview of the study by introducing the research topic, stating the problem, outlining the research objectives and questions, presenting a concise methodology overview, concept clarification and outlining the thesis structure. Subsequently, the following chapter furnishes the reader with vital contextual insights into historical, political, and legislative dimensions that influence the study's scope and relevance.

CHAPTER TWO
CONTEXTUALISATION OF THE STUDY

2.1 Introduction

Considering the study location in WC, SA, this chapter contextualises the characteristic circumstances shaped by the nation's tumultuous history whose enduring ramifications persist today. The chapter is divided into two main areas. Firstly, it discusses the history and development of education focusing on teacher education in SA. Secondly, it offers contextual insights into the processes, policies and policy changes leading to the emergence of collaboration schools. It includes an examination of how governance affairs, specifically performance management, are understood in public schools and, expressly, in collaboration schools.

2.2 Context A: Education and Teacher Evaluation Development in South Africa

2.2.1 Historical Background and Apartheid South Africa

The spread of the British Empire included the control of SA where the British established a government and education system like those of other colonies. Colonies were used for disseminating language and traditions, and exerting social control, making English the official language across schools, government, and churches (Msila, 2007:147). Mission education aimed to educate native Africans so that they could partake in church and assist with the Western ways of life in order to attain and maintain political goals. After the Anglo-Boer war ended in 1902, the defeated Afrikaners established their own republics. However, diverse settlers, including non-British individuals, opposed British rule, leading to the Boer/Afrikaner resistance. This ended in the establishment of a separate Afrikaner education system post-Anglo-Boer war, based on the Christian National Education (CNE), laying the groundwork for apartheid education (Msila, 2007:149).

Both the British education system and the CNE abused religion for political gain and private objectives. Under the National Party, apartheid education implemented division among ethnic populations, or nations, to uphold apartheid ideology and social engineering. D.F. Malan and the Dutch Reform Church (DRC) promoted separation across cultural, religious, and political realms. The ideology justified white superiority through religion while directing African development through segregated education systems for each racial group (Sirkhotte, 2018:8).

This resulted in 19 education departments with the majority of the educational resources going to the minority white population. Supporting policies and legislation, including the Bantu Education Act of 1953, reinforced this divide (Sirkhotte, 2018; Welch, 2002). The NP ideology was further entrenched through such legislation and policies to ensure "an inferior education of black African learners" (Equal Education, 2011, cited by Sirkhotte, 2018:9). Black learners were only educated until age 13, enabling their role as a source of labour. The curriculum across all 19 departments preserved racial myths, stereotypes, and values such as "love your own kind" (Sirkhotte, 2018:9).

During this era, the Bantu Affairs Department controlled schools by overseeing daily school matters and teacher appointments (Naidu, 2011:13). Financial policy limited black education spending, with expenditure at one-tenth of white education. Only 15% of black teachers had teaching certificates, compared to 96% in white schools. Teaching appointments were based on race (Naidu, 2011:14). All teachers were trained by government institutions which embedded racial bias. Ethnic teachers were often denied access to training and professional development opportunities and were subject to lower salaries and limited opportunities for career progression (Christie & Collins, 1982).

Under apartheid, the limited performance management systems for teachers were used to evaluate and control to ensure racial segregation. The Bantu Education Act centralised power, leading to the closure of night schools and part-time classes, the removal of white teachers from black schools, the replacing of male teachers with females, and the decrease in the qualification requirements that led to poor education and overcrowding in the Bantu system (Christie & Collins, 1982:67).

Teachers were limited by regulations and controls. The merit system deepened inequalities and provided further opportunities for abuse. Inspectors monitored teachers by evaluating compliance and reinforcing narrow curricula and government ideologies. Teachers referred to the school inspectors as "government spies" who created large amounts of conflict when teachers did not conform to the rote learning methodologies and watered-down education curricula (Wieder, 2002:138). Inspections focused on finding fault and serving a punitive agenda rather than supporting quality education. The inspectors used evaluation as a means of control, suspension, transfer, and dismissal for teachers perceived to be disloyal to the apartheid ideologies (Amoako, 2014:150). The performance evaluation methods employed during the apartheid era were overtly designed to perpetuate racial inequality. These systems often faced accusations of bias and the promotion of a particular curriculum.

2.2.2 South African Education and Teacher Evaluation Post-Apartheid

The late 1970s witnessed a political uprising against state schooling, involving the removal of school inspectors from schools as representatives of state surveillance. This event drastically redefined the power dynamics between state authority and public schooling (Jansen, 2013:83). Arising from this resistance to apartheid education was the South African Democratic Teachers Union (SADTU), a radical teacher union that has now grown to be the nation's largest union (CDE, 2015:05).

Teacher education in SA was largely shaped by apartheid politics, resulting in an education system that perpetuated racial inequality and inadequately prepared teachers for the challenges they faced in the classroom. Post-apartheid teacher education initiatives sought to equip educators with the necessary knowledge, skills, and attitudes to thrive in the new educational landscape (Welch, 2002:32).

The end of apartheid in SA in 1994 marked a significant shift in the country's education system, prompting attempts to rectify inequalities and to create a more equitable and inclusive educational landscape. In dealing with the segregated, unequal, and inefficient education systems, the new government undertook the National Teacher Education Audit aimed at analysing teacher supply and demand, and evaluating teacher quality, governance and training (Welch, 2002:23).

Post-apartheid educational transformation in SA was guided by policy concerns and approaches aimed at achieving educational equity and quality against a growing scepticism of transformational practices (Sayed, 2001:3). The post-apartheid political transformation ushered in numerous legislative frameworks, policies, amendments, and statutory bodies in the education sector. A vital aspect of these changes was the recognition of effective teacher appraisal, evaluation, monitoring, and performance management systems. These mechanisms aimed to continually enhance teaching practices and provide necessary guidance. Post 1994, there was an urgency to ensure that teacher qualifications and education programmes could transform practices as the revised Norms and Standards of Teacher Education policy document, gazetted on 4 February 2000, moved towards an outcomes-based system in line with the new National Qualification (Welch, 2002:30).

Teacher Evaluation

During the mid-1990s, SA operated three distinct quality management programmes in public

schools, focused on teacher performance, development, and whole-school evaluation. However, these programmes functioned separately, fragmenting accountability. The Education Labour Relations Council (ELRC) Collective Agreement 9 in 2003 aimed to align the various quality management programmes and implement an Integrated Quality Management System which included the Developmental Appraisal, Performance Management and Whole School Evaluation (ELRC, 2003).

A significant development in teacher performance management was the introduction of the Integrated Quality Management System (IQMS) in 2003, derived from the new quality management framework (CDE, 2015). The IQMS appraised and evaluated teachers' performance, offering feedback and areas of improvement. This system embraced comprehensive evaluation, based on predefined performance criteria, designed to assess competence, encourage development, and ensure accountability (CDE, 2015:5).

However, the IQMS faced challenges of assuming unrealistic teacher competencies and work perceptions. It imposed internal and external bureaucratic and professional monitoring, leading to tensions and a lack of leadership capacity at the district and school levels (De Clercq, 2008:14). To enhance monitoring, classroom observations, peer evaluations, and external evaluation panels were introduced. These measures aimed to provide a comprehensive understanding of teacher performance and foster continuous professional development, but effective evaluation required trained evaluators capable of data-informed decisions, which can only be developed through training, expertise, and moderation (De Clercq, 2008:15). The insufficient training for evaluators hampered the effectiveness of these mechanisms.

Due to the legacy of apartheid, most South African teachers approached their work as public servants rather than professionals (De Clercq, 2008:9). The ambitious post-apartheid policy reforms and their implementation challenges overwhelmed teachers and they reverted to traditional teaching styles, regardless of reforms. Despite efforts, IQMS challenges persisted, emphasising pay and progression over professional growth. This coupled with limited development opportunities, training obstacles, union resistance and a lack of quality assurance, hampered success. Moreover, evidence is lacking to prove IQMS's effectiveness in accountability or measuring student learning outcomes (CDE, 2015:20).

SA's education system has transformed considerably post-apartheid, yet persistent challenges remain. Ongoing support and investment are imperative to ensure all students access quality education.

2.2.3 SA Teacher Evaluation 2009 to Present

The ELRC Collective Agreement 2 of 2009 addressed teacher performance management (ELRC, 2009). However, concerns persisted regarding teacher appraisal, the IQMS system, and its implementation challenges. The list of implementation problems appeared endless. Due to this and other ongoing challenges with the IQMS, the Department of Basic Education and the Department of Higher Education and Training called a multi-stakeholder Teacher Development Summit to examine the challenges relating to teacher development with the intention of seeking strategies to address them (CDE, 2015:7).

At the summit, participants resolved to formulate a coherent, integrated national plan for teacher development covering appraisal and development. Agreements included delinking teacher development appraisal from remuneration, streamlining and rebranding the IQMS, and reassessing mechanisms, standards, and criteria to create a non-punitive system, where teachers could address and discuss their challenges (ELRC, 2009; CDE, 2015). The purpose of the streamlining and re-branding was to enable the different quality management systems to work together and strengthen each other, to clarify the relationship between programmes and to minimise duplication and strengthen accountability.

Stemming from the summit, the Integrated Strategic Planning Framework for Teacher Education and Development (ISPFTED) was launched in 2011 to improve teacher quality and the quality of teacher development. The ISPFTED advocated various teacher development and support opportunities, separated teacher appraisal from remuneration, and tasked the ELRC with re-streamlining and rebranding the IQMS. Subsequently, the ELRC released the Collective Agreement no. 2 of 2014 on Quality Management System (QMS) for School-Based Educators which was revised, repealed, and updated in the ELRC Collective Agreement no. 2 of 2020. The QMS implementation and management responsibilities were assigned to the school management team, simplifying processes, establishing grievance and moderation elements, and allowing educator assessment by superiors, with peer rating as an additional option only (CDE, 2015:8).

The preceding section offered insight into the evolution of education in South Africa and the evolution of teacher evaluation, particularly acknowledging the apartheid-era political landscape. It also delineated the trajectory of teacher evaluation from the post-apartheid era to the present. The subsequent section delves into the policy context surrounding the inception and controversies surrounding collaboration schools, while also examining the policy framework for performance management in South African education.

2.3 Context B: Collaboration Schools as Educational Public-Private Partnerships in South Africa

This study focuses on educational PPP in the WC, SA, referred to as "collaboration schools". It looks at governance affairs through the focus on performance management. The above section provided contextual insight into performance management development in SA. A contextual understanding of private-public partnerships and how performance management operates in these structures is below.

2.3.1 Policy Context Regarding Creation of Collaboration Schools and Political Controversy

In 2018, the WCED amended the Western Cape Provincial School Education Act, 1997 (Act 12 of 1997). Section 12 of the Western Cape Provincial School Education Bill Amendment Act (no. 4, 2018), referred to as the WC Amendment Bill, deviates from the national framework in the following ways: notably, it grants greater authority to external education service providers than to local parents on the school governing body. This contradicts the democratic philosophy outlined in the South African Schools Act 84 of 1996 (SA, 1996b) and the White Paper 2. However, it can be argued that SASA created the space for the collaboration schools to be legally realised.

SASA introduced a framework accommodating three educational structures to address diverse learner and community needs within SA. Clause 39 empowered School Governing Bodies (SGBs) to determine and levy school fees. This clause, along with the Revised National Norms and Standards for School Funding (2006), classified schools into three broad groups based on their fee structures.

Firstly, No-Fee Schools are public schools that do not charge school fees. These schools are typically located in economically disadvantaged communities serving students from minimal-income homes. The state provides additional subsidies to these schools to cover operational expenses. Secondly, Fee-Charging Public Schools are public schools where the governing body has voted to charge school fees, generally offering more resources, including SGB employees. Lastly, independent private schools operate outside the public schooling systems receiving no state subsidies; they exercise autonomy over fees, admission, and curricula.

The Department of Basic Education has established national norms and standards for school funding. These norms outline the minimum funding requirements for schools, considering

factors such as learner enrolment, infrastructure needs, and socio-economic conditions of the school community. They aim to ensure equitable financial support, particularly for disadvantaged schools. This support includes programmes like transportation, meals, and the quintile system. The quintile system classifies South African public schools into five categories based on socio-economic conditions. Schools in quintiles 1 and 2, termed no-fee schools, receive additional funding and resources from the state. Schools in quintiles 3 to 5 are fee-charging schools. This system aims to prioritise resources for schools serving disadvantaged communities. The quintile classification is determined by catchment area factors such as poverty rates and unemployment.

The *White Paper on the Organisation, Governance, and Funding of Schools* (South Africa, 1996) emphasises the need for an equitable, efficient, and sustainable school system that addresses historical inequalities. Responding to this, the South African Schools Act No. 84 of 1996 (SA, 1996b) formulated governance policies for schools that included establishing SGBs as representatives of local communities and parents. The composition of SGBs is strictly regulated by SASA, mandating that parents form the majority. The White Paper 2 (1996) speaks to the need for the presence of parent voices in school governance:

"1.10 The Ministry of Education has strongly endorsed parental rights in their Children's education:

"Parents or guardians have the primary responsibility for the education of their children and have the right to be consulted by the state authorities concerning the form that education should take and to take part in its governance. Parents have the inalienable right to choose the form of education, which is best for their children, particularly in the early years of schooling, whether provided by the state or not, subject to reasonable safeguards which may be required by law. The parent's right to choose includes choice of the language, cultural or religious basis of the child's education, with due regard to the rights of others and the rights of choice of the growing child" (Education White Paper 1, p. 21).

"1.11 The Ministry's proposals include a major role for parents in school governance, to be exercised in the spirit of a partnership between the provincial education department and a local community."

The Western Cape Provincial School Education Bill Amendment Act (no 4, 2018) introduces collaboration schools, granting the school operation partner a 50% share in the SGB. It also allows the WCED to fund teaching posts at collaboration schools rather than employing

teachers directly. The SGB becomes responsible for appointing teachers, with accountability resting on them and the SOP, not the WCED. Additionally, the operating partner can monitor curriculum delivery, without specified educational experience (Equal Education, 2018:44). This suggests that the SOP responsible for managing or overseeing the operations of a particular educational institution or program does not necessarily need to possess specific educational qualifications or experience in the field of education. The SOP tasked with managing the day-to-day operations of the school may not be required to have a background in education, pedagogy, or curriculum development (Equal Education, 2018:44).

School governance and autonomy have been a core agenda for South African education agencies as outlined in the SASA. Section 23 sets out the composition requirements of the SBG, aligning with White Paper 2's call to address inequality through the representation of parents, students and community members in governance aspects of the schools.

Lastly, in terms of the current schooling structures in SA and the quintile systems incorporated to promote equitable access to education and alleviate the financial burden, it is unsure how the collaboration schools are being classified. Despite SOPs receiving management fees and collaboration schools being labelled as public no-fee schools on the WCED website, their quintile classification is not clear. The model appears to create a unique schooling structure, blending elements of no-fee, fee-charging, and independent schools in terms of finances, governance, and curriculum control. This potentially adds a fourth category to the education system, further dividing it (Sayed & Soudien, 2021).

The above context highlights the policies and legislation that allowed for the creation of the collaboration school pilot and notes how aspects of the Western Cape Provincial School Education Bill Amendment Act (no 4, 2018) have caused controversy around the conflicting elements with national legislation. The next section provides the reader context in the foundations of the collaboration school project on which this study is based.

2.3.2 Western Cape Education Department Collaboration School Project

A discussion around the Collaboration School Pilot Project began amongst funders and the WCED in 2014; no other known stakeholders were privy to the discussions. A memorandum of agreement between the WCED and the project donors was signed on 1 September 2015 (Feldman, 2020:8). The WCED shared that it was approached by a group of funders to pilot an education reform system in no-fee schools, namely, the Collaboration School Pilot (Schafer, 2015).

The collaboration school model involves three parties: the government, an operating partner (an NPO responsible for school management and improved student outcomes), and the donor group providing additional funding (Sayed & Soudien, 2021:127). The model is run in two forms in the WC. In both forms, the SOP receives grants from the WCED for managing the school performance criteria. The first form involves an existing failing school being handed over to the operating partner. Existing teachers retain their positions with the WCED while new vacancies are filled by the school SGB and SOP, who will continue to receive funds for the posts. Eventually, all positions become SGB posts. The second form applies to newly built schools managed by the SOP. Here, teachers' salaries remain covered by WCED funds as they would have in a state school, but all appointments are made and managed through the SGB. Teachers employed by SGB are not governed by the Employment of Education Act as those appointed by WCED are (Fredericks, 2015b). The intention exists for all future new schools to be automatically part of the collaboration school model (Sayed & Soudien, 2021:127).

To implement these changes, the SGB composition shifts to grant the SOP a majority representation, as outlined in the legislation. The SOP retains a 50% representation on the SGB which holds the ability to hire staff directly from state funds (Schäfer, 2015). Given this dynamic of SBG representation, the SOP assumes crucial SGB responsibilities including the employment, management, and development of teaching staff towards the mandated necessity to deliver quality education (Western Cape Government, 2018). Such a directive, which requires the SOP to deliver quality education, would not be possible without the ability to oversee staffing matters within schools. Therefore, despite the SGB officially holding the legal employer status (de jure), the scenario fosters an environment wherein the SOP effectively functions as the practical employer in reality (de facto). This situation was confirmed in the study findings and is discussed in more detail in Chapter Five.

The collaboration school model has created a dual governance system within public schools in the WC, with no known reference to how the system will operate in future. In 2016, the WCED established the Collaboration School Pilot Support Office to oversee and assist the Collaboration Schools Pilot Project on behalf of funders where the SOPs were selected and allocated to the schools.

The collaboration school model has attracted conflicting views and multiple critiques. In 2015, teachers from Oranjekloof Primary, an original participant in the pilot, protested against the WCED project, displaying signs saying "#CollaborationMustFall" and "Away with the privatisation of public schools". David Harrison of the DG Murray Trust, representing the funders, passionately supports the pilot, viewing private education facilitation as a way to

strengthen disadvantaged communities (Harrison, 2017a). In his article, "The public-school partnership pilot – is it worth it? Let parents decide", Harrison (2017b) advocates the 50/50 SGB partnership with the SOP on the SGB is at parents' request and allows for parents' voices and community involvement.

Supporters of the collaboration school model use the state's education failure as justification. Frustration with the state's inability to address poor community schools' needs has led to a semi-private nature in the public system, where even in state schools fee payment is common, transferring responsibility to the parents of the school through the SGB. Therefore, having a SOP "pay fees" to the school and take responsibility for it through the SGB is not that far removed from current expectations (Sayed & Soudien, 2021:122-123). The Western Cape High Court agreed with this logic and upheld the changes to the provincial law challenged by SADTU and Equal Education stating that SASA and national law had not been violated as parents and learners constitutionally mandated oversight roles within the SGB remain, despite the SOP representation (DGMT, 2023).

Allowing this shift in responsibility from state to private, especially in failing schools, provides the space for private actors to enter the education arena further decentralising the state involvement. This grants models, such as the collaboration school model, the freedom to govern, navigate the curriculum and manage staff and finances (Sayed & Soudien, 2021:127). Although the collaboration school model is strongly based on the UK Academies (Zille, 2016), there is limited evidence that supports any notable improvement factors within failing schools in poorer communities associated with such ePPP models. Additionally, these models have been shown to escalate state education spending (Ladd & Fiske, 2016:31).

The collaboration schools pilot model is funded and sponsored by a consortium of funders, namely, the Ark School Network, The Millennium Trust, the Michael & Susan Dell Foundation and the DG Murray Trust. The consortium provides schools with extra resources, IT, training, and evaluation tools (Sayed & Soudien, 2021:132). The SOP and the SGB receive further funding from the state to cover teacher salaries and school management.

Despite good intentions and funding, two of the five pilot sites declined the collaboration school model. Lange High School and Oranjekloof Primary experienced SOP departures soon after the attempted partnership due to teacher support and South African Democratic Teachers Union (SADTU) involvement (Zille, 2016). While some schools declined, the offer's cash investment per student appeal, especially for schools experiencing resource challenges, such as functioning toilets, and a shortage of teachers and textbooks, is undeniable (Motsepe,

2016). As a result, poor black parents are being asked to relinquish authority in ways that wealthier schools seldom encounter (Motsepe, 2016).

The launch of the collaboration school pilot in 2015 lacked the characteristics of a true pilot. It expanded rapidly, with no evaluation before expansion. Beginning with five schools in 2015, the model now encompasses 13 schools in the WC and undergoes annual growth (WCED, 2022). Legislation changes occurred in November 2018, yet no reports or documents from the state, funders, or JET – an independent NPO tasked with evaluating the pilot – are available (Feldman, 2020:12). In fact, to date, there has been shockingly little information made available to the public about the model despite claims that this information exists. The WCED stated that their circuit managers are used for collaboration school assessment and that the WCED reviews and analyses the necessary data. Yet, transparency remains elusive, including how the R75 million received, as noted by Debbie Shafer in 2017, was allocated (Feldman, 2020:13).

Uncertainty surrounds the long-term practical implementation of the Western Cape collaboration schools project, particularly its potential to enhance education delivery in poor communities and its ability to address the concerns about shifting political influences and sustainability.

2.3.3 Performance Management in Public Schools in South Africa

As collaboration schools are still seen as public schools, there is an expectation that they might be required to follow the standard performance management system as all public schools in SA. On September 17, 2020, the Education Labour Relations Council updated Collective Agreement Number 2 of 2020, introducing the Quality Management System (QMS) to enhance the accountability of educators and school personnel through standardised evaluation (ELRC, 2020). While the QMS signifies progress, ambiguity persists around its adoption in collaboration schools.

The purpose of this agreement was to establish a standardised performance framework for teachers and school personnel. It applies to the Department of Education and all employees as defined by the Employment of Educators Act, building on previous agreements, including the 2003 Integrated Quality Management System and the 2009 Teacher Summit outcome. Data collection for this study occurred in late 2020 before the QMS system was fully rolled out and therefore this study still refers to IQMS systems as some elements were still in use in the public schooling system at the time.

The quality management system is a teacher performance management system that seeks to improve school performance. It evaluates teachers' performance as per their job descriptions, roles and responsibilities to ensure accountability to their schools and careers. It provides a basis for rewards and development while considering contextual factors (ELRC, 2020). The Collective Agreement Number 2 of 2020 (QMS) outlines guiding principles and roles of stakeholders, including school management teams, circuit managers, and principals. It incorporates a grievance mechanism, implementation guidelines, components, training, planning, timelines, and procedures. The agreement mandates appraisal and lesson observations by immediate supervisors, resource persons, and experienced members of the school management team. It also correlates appraisal and development to drive professional growth. Performance standards, criteria, and outcomes for teaching and school professionals are provided on a 4-point scale from unacceptable to outstanding, with a mid-year and annual assessment.

It was not known before data collection which performance management systems were in place in collaboration schools and, as they are still referred to as public schools, whether they still need to undergo the QMS/IQMS process as other normal public-schools. This lack of clarity persisted during data collection. The Senior Management Team (SMT) received conflicting information about whether collaboration schools should establish their performance management systems similar to private non-state-run schools in SA, or if they should adhere to state regulations. Notably, the schools seemed to be implementing certain aspects of the QMS/IQMS systems, while also considering performance management aspects through a data-driven IQMS process, mandated by the SOP. Teachers interviewed mentioned the need to complete IMQS assessment sheets and prepare for classroom visits. Moreover, after collecting the required documentation, an SMT member consulted their circuit manager to finalise the process but was informed that the undertaking was unnecessary, even though teachers had participated in some elements of the public IQMS process.

The collaboration school featured in this study utilised a Data Driven Dashboard (DDD) system, compelling teachers to input substantial data. Additionally, teachers were required to collaborate, access, disseminate, and present the data in various formats. This enabled them to assess their own performance, compare it with peers, and report to school management. While policies did not explicitly outline the use of this information, it was understood to influence promotions, development, performance and contract renewals. Chapter Three delves further into the implications of such datafication systems, particularly under the performativity section.

2.4 Chapter Summary

This chapter provides the study with a contextual backdrop of SA's historical and present education system, focusing on the development of teachers' performance management. It specifically examines the emergence of collaboration schools in the WC, by exploring the relevant policies and legislation governing these institutions. Additionally, it highlights the policies, legislations, and documentation concerning collaboration schools, noting the controversies associated with these schools. The chapter also takes into account the most recent advancements in the domain of performance management development within the public schooling sector. It provides valuable insights and context regarding the existing performance management frameworks within South African public schools. Consequently, the chapter establishes the anticipated benchmarks for collaboration schools, which, as public institutions, are expected to adhere to similar guidelines.

CHAPTER THREE
LITERATURE REVIEW

3.1 Introduction

The literature review for this research focuses on a primary area derived from the research question concerning teachers' understanding of performance management in collaboration schools. It delves into details concerning topics relevant to the study comprising two sub-questions: the operationalisation of performance management and the consequential effects it has on teachers. The chapter comprises four sections. Firstly, it provides an overview of international models and perspectives on Public-Private Partnerships (PPPs), with a focus on the WCED collaboration school project in SA. Secondly, it discusses performance management, including its definitions, purpose, governance, and leadership roles. The subsequent section explores the effects of performance management on motivation, stress, and emotional labour. Lastly, the concept of "performativity" is introduced as a macro-outcome, providing a framework for understanding the empirical findings. These sections collectively form a conceptual framework guiding the study.

3.2 Public-Private Partnerships

The section on PPPs begins by contextualising and theorising PPP, followed by a discussion of the rationale behind the emergence of PPP. A concise reference to the WC PPP is included, but details exist in the context chapter. Additionally, a separate section is dedicated to highlighting the key issues associated with PPP that guided the focus of this study.

Over the last few decades, PPPs have gained prominence within the framework of the Global Education Reform Movement (GERM), which advocates for the infusion of market-based policies into the education domain. This movement, driven by neoliberal ideologies, posits that, traditionally within the public sphere, education should embrace competitive market forces affiliated with the private sector. The aim is to optimise results, outcomes, and quality through increased choice and competition (Santori, 2017; Sahlberg, 2016). This phenomenon, often referred to as New Public Management, challenges the conventional demarcation of public and private sectors, introducing business elements such as standardisation, return on investment, and innovation into educational discourse (Santori, 2017; Sahlberg, 2016). Sahlberg (2016) contends that countries showcasing educational success have managed to strike a balance, acknowledging GERM's influence without making it the overriding policy driver. Despite the pressure for neoliberal ideals, a significant portion of educational

stakeholders recognise the limitations of market-based policies in education.

The momentum behind PPPs lies in the private sector's claim that addressing an education challenge, such as teacher provision, necessitates collaborative efforts between the state and for-profit entities (Santori, 2017). PPPs, as collaborative frameworks, aim not to displace the state through privatisation but to complement and partner with it, thereby enhancing their appeal.

Defining PPPs within the educational context requires nuance. This study adopted Feldman's (2020:2) interpretation that PPPs are agreements between private and public institutions, as distinct sectors, collaborating on infrastructure or service delivery. The crux of PPPs lies in risk-sharing, decision-making, and mutual benefits in a long-term endeavour.

In educational settings, PPPs signify a modern reform aligned with neoliberal ideologies, demonstrated by the WCED collaboration school initiative. While PPPs are not new, their application has expanded into traditionally public areas such as education. International studies on educational PPPs yield mixed results (Tilak, 2010:3) and, as evidenced in the UK academies and the US charter schools, PPPs are gaining traction, especially in the form of academy schools (Salokangas & Chapman, 2014; Ladd & Fiske, 2016).

A robust PPP framework necessitates transparent governance and meticulous planning. Barrera-Osorio et al. (2012) propose guidelines that encompass performance standards, measurements, operating requisites, and authoritative bodies overseeing fund allocation from the state to private public schools. The importance of diligent oversight and corrective action mechanisms is stressed (Wohlstetter, 2015). Proper planning, based on a successful pilot programme and comprehensive risk assessment, are paramount, particularly in conflict-affected regions adopting PPP models (De Koning, 2018:175).

However, on reviewing PPP implementation in the WC, gaps were revealed. The absence of available documentation and transparency hinders complete investigation. The WCED introduced the collaboration school pilot programme, aligned with the UK Academy model which enables public schools to operate in partnership with non-profit organisations and donors, as a potential solution for underperforming schools with the goal of improving the provision of education to students who cannot afford to pay tuition. Yet, concerns arise over the pilot's execution, expansion, and legislative alignment as the model expanded rapidly without evaluation (Feldman, 2020; Sayed & Soudien, 2021).

Teachers' unions in South Africa expressed unease regarding public funds allocated to privatisation efforts, impacting teachers' autonomy and well-being (Fredericks, 2015a). Amid such challenges, understanding the operationalisation of PPPs, particularly in terms of governance and accountability, becomes a focal point. More context, details and understanding of collaboration schools are shared in Chapter Two regarding the context of the study. A brief discussion of the subject is included in the literature review but should be read in combination with the supporting text in Chapter Two. The next section unpacks issues that have emerged from international studies on education PPP, as possible challenges that may have emerged during this study.

Issues that have emerged from PPP

Verger and Moschetti (2017b:4) explored how the government's capacity in US and UK, to plan, coordinate, organise, regulate, and finance PPPs is often constrained, particularly when juxtaposed with state-governed approaches. There is a compelling argument in favour of completely transforming a system into a PPP model due to the government's struggle to manage both PPPs and traditional public schools. However, this shift carries a heightened risk as the PPP policy's equity, quality, and right-to-education aspects have not been comprehensively analysed. Consequently, the question arises whether governments view PPP as a short-term solution, while addressing concerns, or as a fundamental shift in altering and reforming educational governance systems and the state's role in education (Verger & Moschetti, 2017b:5). By 2016, stakeholders in the English policy system acknowledged the inefficacy of relying solely on school autonomy to improve education, prompting a move toward an all-academy system (Fiske & Ladd, 2020:3).

Both the UK and US models reveal instances where a reduction in local control, inherent to these models, led to ineffective decisions by bureaucrats and companies lacking a nuanced understanding of historical backgrounds and local community challenges (Fiske & Ladd, 2020:11). Ensuring that community needs are met remains essential, but this goal weakens if Multi-Academy Trusts (MATs) or similar entities prioritise their own interests (Fiske & Ladd, 2020:10). Lessons from UK public-private partnership experiences highlight the detrimental impact of excluding local authorities from decision-making, which undermines the broader public interest (Fiske & Ladd, 2020:11). Given the challenges encountered in other countries during the implementation of educational PPP reforms, including the burden of managing two systems, long-term effects, community engagement, differing stakeholder interests, and power dynamics, one would expect such concerns to be addressed through comprehensive stakeholder engagement in new implementations (Fiske & Ladd 2016, 2020; Verger &

Moschetti, 2017a, 2017b; Tilak, 2010).

The illusion of autonomy within PPPs carries hidden costs. Autonomy's rationale is to advance innovation and competition to improve standards. West and Wolfe (2019) echo concerns raised by Ladd and Fiske (2016), highlighting how UK academies forfeit curriculum autonomy and the school's capacity to make locally informed decisions based on community needs. Similarly, in the UK and US, partnership schools struggle with the loss of autonomy to MATs and Charter Management Organisations (CMOs), jeopardising the potential improvement of educational outcomes for disadvantaged students. Thus, instead of relying solely on MATs or CMOs, supporting and strengthening local districts through specialised authorities and development might be a more viable approach to educational reform (Ladd & Fiske, 2016).

Tilak (2010:7) emphasises the challenge arising from the differing objectives and interests of state and private players in PPPs. The difference is especially pronounced in education as governments consider education a public good with social impact, while private entities view it as a source of profit and personal gain. A public good is typically defined as "something of benefit which cannot be subdivided into individual shares and can thus only be effectively provided by all, for all" (Jonathan, 1997, cited by Feldman, 2020:3). PPPs can be perceived as business contracts between weak states and powerful private sector players, leading to confusion and a lack of clarity in accountability roles. These concerns may pave the way for complete privatisation of education, with the private sector's influence growing as the state's role diminishes. Ball (2009) offers a similar caution, noting that the privatisation of education through PPPs can foster increasing business opportunities and outside vendor influence at the expense of the education system.

Salokangas and Chapman (2014) point out the varied relationships between sponsors and schools in UK Academies. Different management styles influence how teachers perceive partnership benefits. To ensure successful implementation, schools should be active participants in selecting partners and arrangements that align with their needs. However, this process often lacks transparency for schools and communities in the UK (Fiske & Ladd, 2020:31). For teachers to effectively implement PPP frameworks, policies and implementation contracts must be shared, including performance standards, indicators, and measurements impacting educators on the front line. Agreements on staffing, qualifications, working conditions, and minimum standards are crucial and must be carefully regulated. Private partners should be obligated to provide transparent data on their operations to the public, thereby ensuring legal and civil society accountability and oversight. For PPPs to be meaningful, they must establish a balanced partnership where neither party wields undue

influence. Emphasising interconnected accountability systems involving all stakeholders and accounting for contextual considerations is essential (De Koning, 2018:169).

Concerns persist regarding academy school admission policies and financial transparency. Admission priorities often favour students from the same academy trust school, privileging those with higher marks or better socio-economic backgrounds. Scrapping SGBs in the UK further limits parental, teacher, and community input on key decisions. Financial decisions and transparency within multi-academy trusts raise issues, as public funds are seemingly used for excessive salaries and settlements. Calls for the reinstatement of the legal identity of all schools, including those within MATs, underscore the importance of local accountability and participation (West & Wolfe, 2019:70).

While PPPs are often presented as cost-effective solutions for underprivileged communities, their effectiveness in practice is questionable. Despite the rationale of expanding equitable access and improving education outcomes for disadvantaged groups, PPPs in such contexts often fall short of their promises. Success largely depends on partnership design and regulatory frameworks (Barrera-Osorio et al., 2012). De Koning (2018:177) highlights the necessity of enhanced regulation and accountability within educational PPPs.

The preceding literature addresses several pivotal concepts and concerns raised by scholars within the area of educational PPPs, providing contextual insight into this study by clarifying the progression that led to the establishment of the collaboration school PPP model in SA. The rationale underlying PPPs, as part of a global movement towards privatisation and decentralisation in alignment with neoliberal ideals, exudes a strong attraction. However, the mixed results stemming from PPP research have revealed that PPPs have not fulfilled their promise as a solution for the marginalised. The literature's examination of control-related issues informs the study's focus on governance, accountability, and performance management, which are key to the research question and contribute insights into the operationalisation of such systems within schools. Research on the WCED's collaboration schools is gradually expanding. Despite the intentions of the WCED and its funding entities, conflicting perspectives and critiques surrounding collaboration schools persist, coupled with significant uncertainty regarding governance and responsibilities.

Given that this study squarely centred on teachers, they are directly impacted by the concerns, which include diminished local community involvement, loss of autonomy, and transparency challenges. Consequently, the study was prompted to consider these factors in its examination of PPP schools in SA. The conceptual framework of PPP governance structures and guiding

policies, in conjunction with emerging literature on WCED collaboration schools (highlighting similar concerns as observed in international PPP studies), therefore forms the foundation of the review.

In light of this novel phenomenon of PPPs in SA, prompted by a specific need to address the government's lapses in delivering quality education to underserved populations, the study aimed to understand and investigate this new educational model further. While research on PPPs and assessments of collaboration schools exist, prominent scholars research in the field, such as Sayed and Soudien (2021), Harrison (2017a, 2017b), Gamedze (2019) and Feldman (2020), have noticeably omitted an exploration of teachers' perspectives within the model. Given the governance apprehensions illustrated in the literature, the governance aspects relevant to teachers, including performance management within collaboration schools, represent an important research gap and a significant area of interest for this study.

3.3 Governance

In contextualising performance management within the domain of education, this study examined how governance structures, particularly those pertaining to performance management, impact teachers operating within the new PPP reform phenomenon. Educational governance incorporates both formal and informal processes that resonate across all levels of the system, from students and classrooms to parents and the community. It is intricately linked to the allocation of resources and decision-making processes at various levels, encompassing policy formulation, priority delineation, resource allocation, and the implementation, monitoring, and evaluation of educational methodologies (Global EFA, 2008:129). The recruitment, allocation, and training of teachers are all governed by these regulatory mechanisms. Furthermore, these systems significantly influence the dynamics and interactions between local, state, and federal governments, communities, and school boards (Global EFA, 2008:129).

3.3.1 Governance for Development or Control

Since performance management constitutes a governance procedure, its utilisation, rationale, and the ongoing debate regarding its applications are incorporated in the ensuing literature review. Governance can function as a tool for either development or control therefore performance management can be harnessed for either or both purposes. Performance management can be conceptualised as the process through which organisational managers plan, oversee, direct, and monitor staff performance (Mosoge & Pilane, 2014:5-7). In this study, the terms "performance management", "performance appraisal", and "performance evaluation"

are interchangeably employed to comprehend performance management systems in their broadest sense, as per the aforementioned definition of the process.

SA currently employs an educational evaluation system referred to as the Quality Management Standard (QMS), which encompasses performance measurement as a component of performance evaluation and the final appraisal of teachers (Mosoge & Pilane, 2014:2). Historically, teacher performance management and appraisal were overseen by line-management supervision. In SA performance management, typically geared toward control, was conducted externally by department subject advisors or inspectors, or internally by school administrators. However, the efficacy of external agents was limited due to a lack of trust, resulting in teachers finding the process stressful and intimidating (De Clercq, 2008:11).

Teacher performance management serves a dual purpose: control and development. These intertwined objectives coexist with tension today. The performance-focused purpose, also known as the accountability model, furnishes management with information for decisions related to promotions, dismissals, demotions, or validation. In contrast, the developmental purpose of teacher appraisal necessitates trust, competence, goal-driven orientation, professionalism, and the inclination for introspection and change. The inherent conflict between these two appraisal goals becomes evident when organisations attempt to amalgamate elements of both approaches (De Clercq, 2008; Mercer et al., 2010).

Performance-based compensation is more frequently associated with the control function of teacher appraisal. This strategy was designed to elevate teaching quality through incentives. However, teachers developed ambivalent interpretations of these policies, particularly the connection between merit pay and teaching quality. For many teachers, merit pay seemed ineffective in enhancing motivation and performance, often perceiving it as more beneficial for high-performing educators who were already motivated to excel (Parcerisa et al., 2022:16).

While promoters of the combined approach support staggered evaluations to promote honest feedback detached from fear, this ideal scenario often has practical constraints. Given that formal performance appraisal systems demand substantial time from both appraisers and appraisees, alternate systems that incorporate both elements, such as annual evaluations, are more frequently adopted (Mercer et al., 2010:144). Another aspect of discourse centres on whether performance evaluation should be geared towards the individual or the institution. Although much literature discusses the integration of both, a seamless synthesis is seldom observed in practice. Overlooking the linkage between employee development and organisational objectives is wasteful; yet failing to acknowledge the impact of organisational

constraints on employee performance is equally unjust. This quandary is particularly challenging when the appraiser holds a managerial role over the employee. Consequently, it is often easier to attribute teacher incompetence rather than admit to inadequate leadership or resource provisions (Mercer et al., 2010:145).

3.3.2 Governance and Public-Private Partnerships

Given the focus of this study on both governance and PPP, the subsequent section examines the current literature's perspective on governance considerations within education reforms such as PPP. As previously mentioned, PPPs have arisen from neoliberal market-oriented ideologies, catalysing global reform movements centred on privatisation and decentralisation.

Traditional notions of accountability have evolved from established public administration and democratic accountability frameworks to reforms centred on decentralised governance structures. In this context, governmental roles have shifted toward distant steering, emphasising service delivery, results-oriented metrics, and performance-based accountability (Gamedze, 2019:15). Notably, the landscape of governance within education systems has witnessed an increase in school autonomy accompanied by external accountability mechanisms such as standardised testing and external evaluations. However, the effectiveness of performance-based accountability mechanisms remains mixed, necessitating accurate definition of stakeholder responsibilities, monitoring and measurement protocols, and remedial actions in cases of default (Gamedze, 2019:18).

In the UK's academy PPP framework, the government aimed to amplify parental choice in education. Nevertheless, doubts persist regarding the extent of actual parental influence, as parental engagement with schools dwindles due to increasing demands on their time, leading to diminished involvement in school affairs (Baxter & Cornforth, 2021:4). Although the collaboration school model exhibits enhanced accountability through reporting to the SOPs, it inadvertently curtails parent and community input by diminishing their role in SGBs, thereby diminishing democratic accountability (Gamedze, 2019:94). The establishment of Multi-Academy Trusts (MATs) and the decentralisation of control aligns with the broader trend across nations to bridge the gap between governmental systems and local school communities. Yet, strategies to bridge this gap have encountered implementation challenges that fail to address fundamental concerns (Baxter & Cornforth, 2021:17). The composition of MAT boards has shifted from representing local interests to favouring members with business-related skills, undermining local accountability in favour of upward business mobility (Baxter & Cornforth, 2021:15). The hierarchical arrangement of Non-Profit Organisation/MAT boards and

multi-level nested governance structures has further detached governance from the educational community, accentuating the tension between local interests and central control (Baxter & Cornforth, 2021:15). Although board members may profess holistic views and inclusive engagement of local voices, communication challenges across different layers, ambiguity in roles, and the misalignment of downward value systems with schools' values and objectives cast doubt on these claims (Baxter & Cornforth, 2021:16). The lack of democratic accountability within PPPs can be attributed to factors such as a lack of transparency, community voice exclusion, and ambiguity surrounding stakeholder roles and responsibilities (Gamedze, 2019).

Both centralisation and decentralisation carry significant consequences, particularly for middle-tier structures situated between schools and authorities. In some cases, decentralisation has obliterated the middle tier, and replaced it with the charity sector. The shift toward network governance as a means to orchestrate school systems has transformed the hierarchical control pattern, engendering a complex landscape that challenges the definition of accountable actors, decision-makers, and coherent functioning (Greany, 2022; Ehren & Perryman, 2018). While network governance and the utilisation of intermediary bodies in the middle tier offer both advantages and disadvantages, these mechanisms have led to fragmented and unclear place-based school support and reporting systems (Greany, 2022:248). In the context of networking and PPP, members may veer off the public objectives trajectory and pursue opportunistic paths. Additionally, schools and their leaders are unlikely to welcome accountability for factors beyond their control. These new systems necessitate a conceptual framework for external accountability practices and internal quality control mechanisms supported by a high level of trust (Ehren & Perryman, 2018:13). Given the infeasibility of reverting to traditional centralised governance structures, new leadership competencies are indispensable at both local levels and higher government and authority positions. Decentralised education calls for creative, systemic thinkers and leaders, who are adept at engaging multiple stakeholders across intricate reforms, to emerge (Greany, 2022:262).

Having explored governance through the lenses of governance-performance management interactions and the governance dynamics within PPPs, the subsequent section will explore the literature and discourse on performance management, which is pertinent to this study.

3.4 Performance Management

Performance management serves as a central avenue for improving communication regarding an organisation's objectives and its employees' performance regarding these goals. This

communication fosters a shared understanding of the organisation's purpose, direction, challenges, and the roles played by its members (Mercer et al., 2010:145). At its core, performance appraisal and management entail identifying areas for improvement and their underlying reasons before embarking on the process of development. This process features accountability and prompts development, consequently reinforcing employee commitment and value within the organisational context. An effective performance management system should encompass elements such as candid feedback provision, constructive improvement dialogue, identification of developmental needs, and the facilitation of agreed-upon changes. Strategic management reviews contribute to charting the organisation's long-term goals while guiding staff toward the realisation of these collective objectives (Cardno, 2012:182).

Performance management is a space where policy, processes, and mechanisms intersect with individuals, their actions, and their behaviour. The study looked into both these dimensions, exploring literature on performance management within these areas. Additionally, the emotional aspects of performance management are considered, by acknowledging its impact on individuals within governance systems. The following sections capture insights taken from the literature.

(a) **Performance Management Structures, Processes and Methods**

Performance management policies outline its design and enactment. Teachers occupy a key role within governance systems and reform agendas, facing a range of challenges involving recruitment, motivation, and deployment. Global EFA (2008:131) highlights the importance of institutional performance management, which, though often restricted, remains crucial due to its intense effects on policy design, particularly concerning student outcomes.

Collaboration schools utilise a non-profit organisation (NPO) to manage the school, called a School Operating Partner (SOP). Historically, NPOs have operated without the same governance and management directives as profit-driven companies. However, as economic pressures mount, NPOs are compelled to enhance efficiency, effectiveness, and accountability. One avenue for achieving these objectives involves the incorporation of performance management systems. This applies to schools and their staff as well. NPO appraisals should comprise initial goal-setting interviews and a reflective process based on job descriptions and organisational requirements established at the outset of each cycle. Additionally, classroom visits, overall feedback, and beneficiary input should be integral components of the appraisal process (Bussin, 2013).

Effective performance management constitutes an ongoing process characterised by structured evaluation and regular feedback, facilitating development and the timely identification of concerns. This approach addresses weaknesses to full effectiveness through a constructive, developmental process that affirms employees' organisational roles. The process underlines retrospective review and future orientation while not negating the importance of addressing poor performance. In such instances, ongoing conduct and capability protocols come into play. Addressing poor performance should be a proactive initiative, pursued with the intent of development and improvement rather than mere dismissal threats. A focus on development, rather than punitive measures, ensures the trust of the employees and reinforces the efficacy of the process (Mercer et al., 2010:144).

Heystek et al. (2014) emphasise the integration of performance management within structures, including personnel and talent development stages. The trajectory begins with recruitment, where job descriptions ideally include performance criteria. Upon induction, every individual should possess insight into their progress, with managers required to provide feedback through constructive engagement. Crafting a specific organisational framework, inclusive of key characteristics and addressing components, is crucial for successful implementation. The effectiveness of this framework hinges on alignment with an organisation's policies, governance structure, and objectives, all of which are conditional on the operational context (Parcerisa et al., 2022:17).

In the domain of performance management, two fundamental questions guide the individual perspective: "What job do you want me to do?" and "How well am I doing the job?" While various elements contribute to a performance management system, three critical factors relate to performance appraisal: staff induction, staff appraisal, and professional development. A symbiotic relationship exists among these elements within an effective performance management system, necessitating their complete integration (Cardno, 2012:91). The South African education system endeavours to establish a framework ensuring that individual teacher contributions contribute to the broader system's efficacy. In this framework, school goals align with the collective efforts of teachers. The system's success hinges on clear expectations, regular feedback, and support for teachers to achieve their goals (Bisschoff & Mathye, 2009:394).

Otley's (1999) framework for creating a performance management structure is amplified by questions that cover the organisation's main objectives, evaluation techniques, future strategies, organisational-level requirements, performance evaluation consequences, and information flow for adaptive adjustments. This framework, together with the characteristics of

performance management systems, suggested by Mosoge and Pilane (2014) and Cardno (2012:91), concludes in a structured framework for evaluation, encompassing the reasons, understanding, consequences, criteria, goals, and implementation of performance management.

However, even in a well-structured system, the fundamental prejudice of individuals involved in appraising others can introduce various challenges. Heystek et al. (2014:150) outline general concerns surrounding appraisals. Notably, the latitude effect arises when appraisers use their personal experiences and standards as benchmarks for evaluation. The halo effect surfaces when performance is influenced by the awareness of observation, while agreement errors occur when appraisers project their qualities onto the staff members. Appraiser motivation wanes when commitment to process accuracy is lacking, and low differentiation occurs when appraisers struggle to distinguish between individuals, expecting uniform patterns. Challenges also arise from pressure to meet non-performance criteria and the frequency of performance appraisals, which might lead to the consideration of very recent or distant performances, disregarding the actual timeframe (Heystek et al., 2014:149).

Heystek et al. (2014:150-151) explores the distinct challenges of performance management systems within South African schools and educational institutions further. Managing professionals, especially teachers, proves intricate due to their inherent independence. Balancing institutional needs with individual autonomy is paramount. The complexity of educational objectives can obscure whether they have been adequately achieved, given the multifaceted socio-environmental factors. Comparing schools' performances becomes challenging, and reward structures are less straightforward compared to the corporate realm. Evaluating teaching also presents challenges, given the lack of universal agreement on what constitutes effective teaching. Defining quality education further complicates matters. The nature of teaching, inherently innovative, defies rigid appraisal checklists. Multiple line managers overseeing teachers and their diverse responsibilities in schools add another layer of complexity. Lastly, the time-intensive nature of teacher appraisal, coupled with the contentious relevance of the SA performance appraisal IQMS mechanism, raises concerns about prioritisation and effectiveness (Heystek et al., 2014:151).

b) Performance Management Actors, People and Leadership

Within the context of investigating educational governance, particularly teacher performance management in the WCED's new education PPP reform, a comprehensive examination of the individuals responsible for overseeing teacher performance management in schools becomes

imperative. This factor entails an investigation of their roles in performance appraisal implementation, the challenges they encounter, and the resultant effects.

Regrettably, there exists a shortage of information relating to the role of SOPs in performance management. Nevertheless, given the alignment of SOPs with management structures and governing bodies, insights derived from senior management teams (SMTs) and leadership roles offer valuable perspectives on potential SOP roles, challenges, and their impact on school performance management. Notably, within collaboration schools, SOPs wield 50% of the governing body votes and assume responsibility for recruiting both educators and non-educators as new positions arise. Consequently, in their capacity as de facto employers through their majority shareholding in the SGB, SOPs bear the onus of overseeing employee performance management. Given that the SMT also contributes to implementation, close collaboration between SOPs and SMTs is essential to ensure seamless adoption of performance management systems in collaboration schools.

Leadership emerges as a pivotal factor in teacher performance management as effective leadership can streamline the process and harness leadership skills to foster a positive correlation between teacher performance and student outcomes (Hartinah et al., 2020:236). Cardno (2012) notes the significance of leadership within teacher performance management. Her work advocates for a holistic professional development model, guiding educational leaders in designing relevant systems across diverse educational sectors. This model comprises three fundamental interlinked components, represented as circles. The core of the model rests on effective performance appraisal, enveloped by the base educational leadership. This synergy is further guided and enriched by the encompassing circle of strategic management and review, which provides direction to the entire framework (Cardno, 2012:101).

Figure 3.1: A Model of Holistic Professional Development

The model introduces four dimensions of performance appraisal: school development, curriculum development, management development, and personal development. These dimensions remain flexible, adapting to an organisation's needs over time. Educational leadership plays a crucial role in fostering a learning culture that supports professional growth and nurtures others' development. Effective leaders influence teacher quality and student achievement, directly or indirectly impacting both. Management development involves motivating and supporting staff and collaborating to achieve shared objectives.

People leadership, rather than being a separate objective, constitutes a complex process that orchestrates the achievement of organisational objectives. In the context of education, this implies the delivery of quality education across all schools. However, true achievement can only be established through measurement and assessment. Organisations inherently comprise groups of individuals working collaboratively to realise their goals in a structured manner. As such, organisational goals are ultimately attained through the collective efforts of people (Heystek et al., 2014). It is incumbent upon managers and leaders to guide and facilitate performance management systems, thereby fostering employee development through this process. Every employee has a rightful expectation to understand how they are performing, and school managers and leaders bear the responsibility to engage in investigation, monitoring, evaluation, and feedback provision to meet this obligation. (Heystek et al., 2014:141).

The provision of feedback and its integral feedback process concerning teachers' progress

towards their goals holds a pivotal role within the dimensions of leadership and management in performance management. This practice not only involves feedback on past performance but also offers insights to enhance future conduct. Leadership in performance management is an ongoing commitment, encompassing daily activities, such as observation, assistance, improvement, and coaching, all rooted in the cultivation of a trusting relationship. Effective communication, explaining the organisation's direction and aligning employees, management, leadership, and strategies, proves indispensable in setting expectations for teaching staff and employees alike. These attributes of clarity and communication are fundamental elements of effective leadership (Aguinis, 2019:48).

When applying for a position or considering an employment offer, teachers should receive comprehensive job descriptions outlining responsibilities, tasks, duties, and performance criteria. Ideally, this document should be reviewed with their manager, and a performance contract or addendum to the contract should be signed. Heystek et al. (2014:141) refer to Wood's model of people assessment, asserting that "the process should be well structured and scheduled well in advance ... the team must meet and discuss these issues before assessment can take place". Effective communication between managers and staff under assessment is imperative. The inherent tension between the developmental and accountability aspects of performance management can be effectively managed through meticulous attention to both organisational and relational aspects. Constructive dialogue that acknowledges intricate challenges and adopts a holistic approach empowers leaders to develop the knowledge and skills required to navigate performance management complexities (Cardno, 2012:103).

A systematic review exploring teacher autonomy within performance-based accountability (PBA) models sheds light on the role of school leaders in PBA processes (Parcerisa et al., 2022:12). The capacity of different leadership styles exists to foster consensus and alleviate negative impacts on teacher autonomy stemming from PBA and administrative demands. Notably, school leaders shape the interpretation and utilisation of performance data. Instances are cited where school leaders cultivate collegial autonomy among teachers, facilitating collaborative planning, discussion, and the exchange of pedagogical approaches, training, and lesson plans, ultimately bolstering teacher development and retention. Additionally, school leaders in Portugal and Spain report positive influences on teacher pedagogies and behaviour resulting from teacher evaluation, leading to increased school engagement, improved teaching practices, and enhanced reflective practices (Parcerisa et al., 2022:12).

Bulawa's study (2014) examined challenges encountered by SMTs during the implementation

of performance management systems in South African schools. This research identifies five primary constraints and challenges faced by SMTs in the performance system implementation process. These challenges encompass the perceived instability of the performance management system, insufficient resources for proper implementation, misalignment between the systems and school objectives, inadequate training, and a disconnect between the school and education head office. These challenges resonate with the general concerns surrounding performance management in schools as elucidated by Heystek et al. (2014:150). Given that SOPs may occupy a similar hierarchical level concerning performance appraisal in schools, it is reasonable to consider that these challenges could manifest in the context of SOPs operating in SA.

The literature discussed above on performance management highlights the delicate balance between control and development purposes within the context of governance. As governance interfaces with entrenched policies and frameworks within organisations, it often takes on control-oriented forms that inadvertently impact teacher autonomy. The process of structuring a successful performance management system revolves around the questions of why, how, and what its effects are. These interconnected inquiries directly correlate with the research questions of this study.

Awareness of concerns raised by previous authors and scholars regarding the intricate nature of teacher performance management, the challenges of defining quality teaching, and the time constraints imposed by performance management informs similar concerns within this study. Lastly, the profound interconnection between performance management, governance, and leadership within schools becomes evident. School leaders hold the power to shape culture, motivation, support systems, communication channels, and feedback mechanisms. It is through adept leadership that schools can harness the affirmative impacts of performance management, fostering teacher collaboration, reflection, and motivation. The literature review on school leaders provides insights into the pivotal role that leadership occupies within schools and the potential benefits, as well as challenges they introduce to school performance management systems.

While a wealth of literature exists on governance, performance management in the business realm, and governance in education. For the specific focus of this study on governance in collaboration schools, a notable gap emerges concerning how performance management affects teachers, their well-being, development, and overall performance.

3.5 Effects of Performance Management on Teachers

Interwoven with the rationale behind implementing performance management to enhance organisational communication is the objective of improving learning outcomes and teaching quality. However, achieving this goal is complicated, given the complexities inherent in teaching and learning. Demonstrating a clear connection between enhanced achievement and specific classroom practices presents a challenge (Mercer et al., 2010:144-145). The intended consequence of performance management, namely, improved communication and learning outcomes, is evident. Additionally, certain effects associated with performance management, although not exclusively in the education context, have been observed and are explored below.

3.5.1 Motivation

The relationship between motivation and performance is inherently intertwined, such that one cannot be discussed without acknowledging the other. Therefore, when examining teacher performance and performance management, it is necessary to consider their motivation and the impact of performance management systems on teachers' motivation. Job performance consists of three primary components, with motivation being one of them. This relationship can be articulated as follows: Job Performance = Motivation X Ability X Situational Constraints (Williams, 2005, cited by Tseke, 2010:19).

Motivation serves as the driving force that enables individuals to surmount challenges. It not only provides energy and direction to behaviours but also reinforces the inclination to persist in a constantly changing environment. Motivation is not a fleeting concept or a quick remedy; instead, it represents an enduring cultural trait and a response to change (Heystek et al., 2014:79).

Numerous motivation theories exist, but for the scope of this research, five prevalent theories are referenced:

- *Hertzberg's Two Factor Theory*: Hertzberg proposed that dissatisfaction-inducing factors (hygiene factors) do not necessarily lead to motivation in their absence, whereas motivating factors offer satisfaction and a sense of accomplishment.

- *Maslow's Hierarchy of Needs*: Maslow's theory suggests that motivation operates across various levels, where basic needs (physical, safety, social) must be fulfilled before higher-order needs (self-esteem, self-actualisation) come into play.

- *Hawthorne Effect*: This phenomenon highlights how individuals tend to exert greater effort and exhibit improved behaviour when they are being observed.

- *Expectancy Theory*: This theory asserts that individuals choose behaviours based on the anticipated outcomes and the likelihood of achieving desired results.

- *Three-Dimensional Theory of Attribution*: This theory explains how individuals attribute reasons to outcomes, influencing future behaviour. It comprises three attribution characteristics (Heystek et al., 2014:81).

Goal setting significantly influences teachers' motivation, making joint goal setting, known as management by objectives (MBO), a pertinent approach. MBO involves collaborative goal-setting between management and individual teachers, establishing transparent criteria that ultimately motivate teachers and enhance their performance (Singh & Rana, 2014; Okoth & Florah, 2019; Heystek et al., 2014). When properly executed, these goals closely align with individual teachers' aspirations while remaining congruent with the schools' overarching objectives. Management bears the responsibility of monitoring progress toward these goals and providing regular feedback to facilitate corrective actions (Heystek et al., 2014:83).

Jones (2005, cited by Tseke 2010:24) provides the following signs that indicate when motivation is present or absent in work behaviour.

Table 3.1: Signs that motivation is present or absent in work behaviour

Signs that motivation is present	Signs that motivation is absent
• High performance	• Apathy and indifference towards the job
• High results consistently being consistently achieved	• Poor record timekeeping and high absenteeism
• Vigour, eagerness and determination to succeed	• Exaggeration of the effects or difficulties encountered in problems, disputes and grievances
• Unstinting cooperation to overcome problems	• Lack of cooperation in dealing with problems or difficulties
• Willingness to accept responsibility	• Unjustified resistance to change.
• Willingness to accommodate necessary change	

(Jones 2005:42, cited by Tseke, 2010:24)

A key aspect of the appraisal process revolves around motivating teachers to improve their effectiveness in their roles. The study conducted by Moyatsi et al. (2006) reveals that teachers perceive performance appraisals as a tool capable of fostering motivation. However, the

effectiveness of this tool hinges on its proper execution, encompassing essential attributes such as reliability, trustworthiness, and validity. If mishandled, the appraisal process can yield counterproductive outcomes. Singh and Rana (2014), in their investigation of the impact of appraisal on teacher motivation in Dehradun City, substantiated the correlation between transparent and impartial performance appraisals and heightened motivation among teachers. Given that teacher motivation significantly influences student learning outcomes, this factor assumes vital importance for educational leaders and managers. The efficacy of education reforms and progressive policies is notably heightened when administered by motivated teachers. Moreover, the contentment and fulfilment of teachers can be intrinsically tied to their motivation. This connection extends beyond their personal well-being, as motivation, or its absence, that bears implications for turnover and absenteeism rates (Neves de Jesus & Lens, 2005:2).

When contemplating the criticality of teacher motivation and assessing its prevailing state, a glaring inconsistency emerges. Despite the well-documented advantages that motivated teachers bring to the educational landscape, a significant number of teachers appear to lack substantial motivation (Neves de Jesus & Lens, 2005). This raises the question: How can teachers be effectively motivated? In addition to remuneration, a plethora of other factors contribute to teachers' motivation, encompassing dedication, classroom success, status, training and mentorship, working conditions, promotional prospects, and career advancement (IICBA, 2017:31).

In light of these considerations, the design of performance management and appraisal systems becomes crucial. Such systems should be thoroughly constructed to yield the desired motivational effects, covering a comprehensive array of motivating factors. An essential component of these systems should involve a robust feedback mechanism, ensuring continuous refinement and enhancement of the system's efficacy.

3.5.2 Factors and Consequences of Teacher Stress

The influence of teacher work-related stress on teacher performance and school effectiveness is a well-documented phenomenon. Studies have demonstrated the significant negative impact of teachers' stress on their job performance (Asaloei et al., 2020:353).

Stress can be defined as emotional or mental strain resulting from challenging situations inherent in life. Responses to stressors vary among individuals, as do the coping mechanisms they employ. While definitions may vary, it is widely agreed that extreme stress or its absence

should be avoided (Holmes, 2005:16). The teaching profession is widely acknowledged as one of the most stress-intensive occupations. A 2017 health survey underlined this reality, revealing that 75% of teachers reported mental or physical health concerns stemming from work-related stress in the preceding two years (Holmes, 2019:21).

Numerous factors contribute to teachers' stress, including adverse workplace conditions, excessive workloads, and internal conflicts. Workload, particularly the administrative and peripheral tasks accompanying the core responsibility of educating students, stands out as a significant stressor. Administrative demands are closely linked to accountability and performance management processes prevalent in schools. While many teachers may express comfort with accountability, the process itself can induce stress. Additionally, the lack of time for reflection and debriefing further erodes teacher well-being (Holmes, 2005:35).

Teaching's stressful nature is widely acknowledged today. Multiple elements within the profession contribute to teacher stress, with excessive stress levels culminating in career-ending effects. Managing workload remains a primary concern for teacher well-being, necessitating the creation of balanced time management strategies (Holmes, 2019:69).

Furthermore, teachers frequently encounter role conflicts, necessitating the allocation of essential energy to seemingly peripheral tasks, such as administrative duties tied to accountability. This imbalance exacerbates stress, anxiety, and emotional fatigue. Recent years have witnessed a worsening of this situation due to the increased integration of monitoring and evaluation in schools. Educational reform governance models commonly incorporate demanding accountability processes, such as performance management, which impose significant data management burdens (Holmes, 2005).

Determining the stakeholders to whom teachers are accountable proves challenging, amplifying uncertainty and stress within the performance management process. Whether teachers answer to school managers, governing bodies, local authorities, parents, or students remains unclear. While these stakeholders should ideally collaborate harmoniously to guide teacher accountability, the practical scenario rarely aligns with this ideal. Accountability often holds symbolic significance for teachers, evoking fear, self-doubt, and critique of accountability models. Consequently, teachers may resist viewing performance management as a growth-oriented avenue (Holmes, 2005:107).

Research consistently indicates a high attrition rate among teachers, attributed to the emotionally charged nature of the profession (Schutz & Lee, 2019:173). Novice teachers,

unprepared for the intricate dynamics of schools and communities, often leave the profession within their first five years. The past decade has witnessed a growing interest in teachers' emotional well-being in the workplace, yielding insights into the daily challenges, emotional experiences, and labour that teachers undergo. These factors significantly impact teaching, learning outcomes, and the evolution of teachers' professional identities (Schutz & Lee, 2019:179).

Teacher stress impacts performance outcomes. As substantiated by research, stress stemming from various sources, particularly workload and accountability pressures, significantly affects teacher well-being and, consequently, educational outcomes. Addressing these stressors is vital for sustaining teacher effectiveness and promoting a conducive learning environment.

3.5.3 Emotional Labour in the Teaching Profession

Closely intertwined with teacher stress and motivation is the notion of emotional labour in the teaching profession. Research consistently underlines that teachers who can authentically express emotions in their roles tend to experience lower stress levels, greater job satisfaction, heightened motivation, and reduced burnout (Wang et al., 2019:664).

The term "emotional labour" was introduced by A. R. Hochschild in 1993 when examining the emotional demands placed on flight attendants during their work. It involves the management of emotions through both displaying and concealing feelings in oneself and others to create a socially acceptable façade in line with the organisation's public image (Hochschild, 2015). Emotional labour can be executed through surface acting, deep acting, or natural expression. Surface acting involves modifying outward emotional displays without altering internal emotions, deep acting entails adjusting inner emotions to align with external emotional displays, and natural expression refers to genuinely expressing emotions congruent with internal feelings (Lynch & Klima, 2020:162).

Teaching, known as an emotionally intensive profession, requires substantial emotional intervention, input, and labour. Teachers adhere to rules dictating when and how emotions can be displayed, particularly during classroom lessons. The need to convey enthusiasm and maintain composure is prevalent (Keller et al., 2014:1). Emotional labour tactics, such as surface acting, are evident in approximately a third of lessons (Keller et al., 2014:1). While many teachers report the need to regulate negative emotions, the emphasis lies in demonstrating a positive state rather than concealing emotions. Interestingly, teachers who

feign enthusiasm more frequently are perceived as more enthusiastic by students, leading to increased intrinsic student motivation and better teacher performance. Yet, it is important to acknowledge that feigning emotions can impact teacher well-being, stress, and motivation. Despite positive performance outcomes, teachers are mindful of the energy required to maintain the desired emotional facade (Burić, 2019:13).

Surface acting is the most detrimental emotional labour strategy, causing heightened cortisol levels and physiological stress (Wang et al., 2019:677). On the other hand, deep acting and natural expression yield mixed results, indicating potential positive impacts on teaching effectiveness and motivation (Yin et al., 2017; Wang et al., 2019).

A prominent consequence of emotional labour is teacher burnout and exhaustion, characterised by reduced engagement, diminished sense of purpose, lack of energy, and decreased motivation. While teachers strive to meet learning objectives and support students, they inadvertently compromise their own well-being, affecting their professional outlook (Lee, 2019:236).

The literature reviewed not only illuminates the effects of performance management but also points towards potential consequences of a performance management system. Motivation stands as a critical factor linked to performance, prompting a constant investigation into methods of enhancing motivation for improved performance and learning outcomes, particularly in education. This decade has seen heightened attention to teacher well-being, emotional labour, and stress, revealing the adverse impacts of increased workload, additional tasks, and persistent surface acting on teachers' stress levels and well-being. Aligning performance management with development goals and creating motivating systems is paramount to mitigate the adverse effects of increased administrative demands and emotional labour tied to performance management.

The literature review on performance management's effects serves as a guiding framework for this study's exploration of potential teacher participant experiences. It sheds light on key concepts and indicators to consider and informs the understanding of positive and negative aspects affecting teachers, who constitute the focal point of this research.

3.6 Performativity and Performance-Driven Accountability Measures in Education

As outlined in the introductory section of this chapter, the review of the performativity literature was integrated into the study during the analysis phase. Through the processes of data

analysis, discussion, and synthesis, it became evident that a more comprehensive conceptual framework was needed to explain the broader implications arising from the effects of performance management. The concept of performativity was found to align most closely with this requirement, offering explanatory constructs that are further elaborated upon in the subsequent chapters.

Nearly two decades ago, Stephen Ball (2003) authored an influential article delving into the alarming impact of performativity on teachers. He defined performativity as a pervasive cultural phenomenon characterised by regulatory mechanisms involving judgements, comparisons, and displays. Its primary purpose is to motivate, control, and reshape teacher performance through a complex interplay of both material and symbolic incentives and penalties. Teachers' performances, viewed as indicators of productivity, qualities, or outcomes, are then subjected to inspection for purposes of evaluation or advancement. However, a critical inquiry develops: Who determines the criteria for defining worthwhile, effective, or satisfactory performance? Moreover, who judges the reliability of the system of measurement or indications employed? (Ball, 2003:216).

Ball (2003:217) explains how new educational policies and adopted methodologies give rise to performativity, facilitated by what he terms "technologies of reform". These mechanisms operate within the spheres of market dynamics, managerialism, and the very concept of performativity. The implications extend beyond governance, fundamentally reshaping the nature of education itself and leading to the emergence of a new type of teacher (Holloway & Brass, 2018). In their work, Holloway and Brass (2018:20) point out the transformation of teachers into self-disciplined entities, adapting to market-oriented, managed, and performative roles. Their actions are dictated by the evaluation criteria, methodologies of evaluation, and the definition of success. Lewis and Holloway (2019) expand this narrative, highlighting teachers' profound assimilation of data-driven, number-based accountability. This metamorphosis not only influences teachers' professional practices but also elevates them to the status of professors of data, shaping teaching practices based on data assimilations. Consequently, this trend shapes the manner in which teachers engage in classroom learning. Furthermore, as data collection tools are selective, focusing on specific types of data deemed most important, teachers tend to tailor their teaching to align with these measurement tools (Lewis & Holloway, 2019:8).

The effects of a heightened emphasis on performance have wide-ranging consequences, reshaping teachers' teaching methods from genuine development, care, and personal connections to strategies solely focused on ensuring student compliance and improving test

scores. This transformation of rich social interactions into mere numerical data for judgment and comparison, known as datafication, becomes a central aspect of teachers' professional identity. The attention shift to data takes away from evaluating whether these numbers truly contribute to positive educational results (Gray & Seiki, 2020:1). This aligns with Ball's (2003:222) argument that datafication and performance focus do not just impact teachers' actions, but also alter their core identity, leading them to define their teaching and success based on the metrics embedded in evaluation tools. As a result, both teachers and school leaders increasingly consider quantifying performance as necessary for self-awareness and school enhancement (Lewis & Holloway, 2019:9)

Around the world, policies centred on data-driven accountability are not lessening educational disparities; instead, they amplify them by stifling teacher autonomy and promoting a focus on test-centred teaching and learning (Singh, 2018:491). The principles of performativity, in fact, bring in a form of social control that subtly guides teachers' behaviour by endorsing systems that constantly produce data for monitoring. While these policies position teachers as independent professionals, they simultaneously regulate what and how they teach based on student performance metrics. Even though these policies suggest transparency and aid in identifying issues and solutions, the sheer nature of data simplifies intricate relationships into mere numbers. As a result, these systems restrict teachers' professional freedom and reshape their teaching methods. This shift towards conformity with data-driven standards lessens the ability to tailor education to specific contexts and oversimplifies complex educational dynamics (Singh, 2018:491).

Numerous studies illustrate that teachers have not only embraced accountability systems, but they have also come to rely on them heavily as benchmarks to assess their own value (Holloway & Brass, 2018; Singh, 2018). Nowadays, teachers consider data to be a tool to validate their roles and have complete faith in numbers to encapsulate their performance. Even in the face of concerns about depending too much on data, injustices, or inaccuracies, they hold onto the belief that data remains fundamentally useful – seemingly the sole way to measure their effectiveness. Traits crucial to effective teaching are now presented in terms of data-responsive factors, pushing traditional indicators like teaching methods, practices, and student connections to the side lines. The prevailing approach now revolves around adopting practices that tangibly enhance data-driven performance, causing teachers to become both generators and consumers of data (Lewis & Holloway, 2019:7).

However, there is scepticism and criticism surrounding this transformation. Critics argue that this change is leading education in an undesirable direction (Daliri-Ngametua & Hardy,

2022:06), resulting in lowered morale and a decrease in the esteem of the teaching profession. The policy-driven gap between teachers' work and the complex, extensive data collection procedures is noticeable. Students are reduced to mere numbers within data sets, intensifying the discouragement and weakening the impact of teachers' professional judgment. This feeling of disconnection adds to what is known as the "disappearing teacher" phenomenon (Daliri-Ngametua & Hardy, 2022:18).

The struggle over the teachers' very soul (Ball, 2003:217) endures as teachers display tangible discomfort as their beliefs (and their altruistic reasons to get into teaching in the first place), and their daily teaching practices (which undermine teacher autonomy and professionalism and include datatification practices that hold little value to them), continues to create professional dissonance and anxiety (Ball 2003; Daliri-Ngametua & Hardy; 2022; Holloway & Brass, 2018). Because of this, the concept of teaching as educational and the meaning of being a teacher is disappearing from our current schooling systems, and is being replaced by concepts of data, statistics, and numbers that lack context – an education system without a sense of purpose (Daliri-Ngametua & Hardy, 2022:19). With the new obsession with datafication, the launching pad for the construct is that the starting barrier to learning is the teacher and embedded in the accountability data-driven system is the schools' need to "fix the teacher problem" (Singh, 2018:491). This leads to what Ball (2003) describes as fabrication: the performance observable by others, the game-playing put on for the spectator simply for teachers to be seen and judged. This fabrication comes at a price as teachers "set aside personal beliefs and commitments to live an existence of calculation" (Ball, 2003:215).

The idea of teachers comprehending and educating the whole child falls short, given the conflicting objective of producing data and evidence of student learning through testing and grades. It is not unexpected that schools do not create secure collaborative spaces for teachers to openly acknowledge challenges and to work on improving their weaknesses in the context of data-driven education and teacher assessment (Gray & Seiki, 2020:70). The standardised focus on performance and the process of datafication, along with the constant gathering of student performance data, leads to a lack of consideration for teachers' professional judgment in evaluating students holistically and their ability to consider broader social and cultural contexts in a child's education (Daliri-Ngametua et al., 2022).

Incorporating a philosophical approach, Powell and Parkes (2019) speak to neoliberalism where the social engagements of all public goods are best impacted by competitive market forces. They define neoliberalism as "an ideology that claims, among other things, that social institutions (including public education) are best shared by competitive market forces" (Powell

& Parkes, 2019:9). Neoliberal reformers see teaching and learning as a simple system of input-output with no other factors. These liberators look at the assessment with no context. They do not seek to understand or consider student backgrounds, demographics or culture. They do not seek to capture how teachers are connecting to students, parents, management and how they are shaping the community. They pay no regard for teachers' advocation for changes, inclusion, impacts on social justice or simply creating a love for learning. Neoliberal reformers are simply concerned with numbers so that they can show their version of accountability and quality. This adds to the re-professionalisation of teachers as all teachers and students are no longer accountable to themselves but to an external measure. But, as we know, not all learning is quantifiable, and data cannot adequately reflect a teacher's worth, merit or even effectiveness. Neoliberal performance measures erode the agency of teachers, particularly around how and what constitutes quality teachers and quality teaching (Powell & Parkes, 2019:2-3). Sondel, Kretchmar and Dunn (2019:4-5) highlight an even deeper concern in the emergence of an elite entrepreneurial network within US Charter Schools that wields authority through neoliberal market-driven narratives creating unchecked racism. As systems promote deregulation, the normalisation of accountability and choice unintentionally reinforces the idea that there is no longer a need to address racial and poverty disparities to ensure fairness.

The modern educational scenario highlights society's shift toward relying on data for validation, pushing teachers to back their professional views with concrete evidence. They are increasingly under pressure to show solid proof of student progress and interventions, especially in the face of unfavourable results. This requirement forces teachers to present their professional opinions in a tangible manner, even if these presentations do not truly reflect their perspectives or students' actual situations (Daliri-Ngametua et al., 2022:14).

Multiple researchers have highlighted the challenges that novice teachers face within the framework of performativity narratives. New teachers begin their careers with a sense of optimism but, upon entering the education system, they are confronted with the need to navigate their teacher identity amidst the demands of their profession. These educators enter the field with an idealised vision of who they are and their goals. However, the clash with external pressures leads to a crisis where they question their value, self-worth, interactions with students, and the effectiveness of their teaching, especially if student test scores are low. This crisis results in a re-evaluation and transformation of their professional identity (Sullivan et al., 2021:5). Institutional performativity introduces a dilemma for new teachers. They must grapple with reconciling their own perceived effective teaching practices with the methods endorsed by schools to meet external demands, often focused on data-driven metrics used to

assess teacher performance. Consequently, their identity becomes malleable, particularly among first-year teachers who encounter challenges that force them to choose between adhering to their beliefs or conforming to the pressures of the system (Sullivan et al., 2021:12).

Newly qualified teachers and those in the early stages of their careers experience even greater pressures within the performativity framework. They are expected to perform at the same level as experienced teachers, leading to heightened uncertainty and doubt. Furthermore, new educators constantly encounter both subtle and clear policies, procedures, and messages concerning their work, performance, expectations, assessment, and the definition of quality teaching. This pervasive performativity narrative shapes their thinking, behaviour, and influences their professional agency (Sullivan et al., 2021:10).

To address the challenges faced by emerging teachers, the education system needs to collaborate with new teachers who uphold student-centred learning processes and move away from an excessive emphasis on student data, particularly in the context of assessing teacher merit and success (Gray & Seiki, 2020:8-9). The assessment of teacher quality and productivity raises fundamental questions about teachers' roles, approaches, relationships, perspectives on work, and determinations of what constitutes a quality teacher. Before the initiation of modern performance management systems, teachers enjoyed a degree of trust and autonomy in their work (Sullivan et al., 2021:8). The unintended consequences of performativity and data-driven practices include diminished teacher confidence, heightened student anxiety, and increased pressure from parents, families, and communities. Decision-makers responsible for evaluating teacher success must reconsider their approach. Moving away from an excessive focus on datafication in favour of a return to a pedagogical approach centred on holistic child development is essential (Gray & Seiki, 2020:7). Educators need to regain agency and have the freedom to make decisions that prioritise their students' well-being. Relying solely on data-intensive assessments to gauge student progress should not be the sole determinant of success. Rebuilding trust in educators is vital. This prompts the question: "If only we trust teachers once again. We must ask ourselves: what would a teacher-run school look like?" (Gray & Seiki, 2020:9).

A significant issue revolves around the lack of a clear, fixed understanding of what makes a teacher or teaching quality stand out. Teachers are expected to evaluate their performance against vague and ever-changing concepts they develop as they progress in their careers. Sullivan et al. (2021:8) studied how educators confront scrutiny, corporate influences, surveys, and accountability measures that depend on predefined criteria stemming from expectations, standards, and measurable accomplishments. Ball (2003:220) points out that teachers wrestle

with a "high degree of uncertainty and instability" because they are evaluated across numerous aspects, by different stakeholders, and based on various standards (Ball, 2003:220). While teachers highly value the human connections in their work, the official evaluation criteria often fail to cover the idealistic elements that initially attracted them to the profession. Additionally, the nature of performance and assessments in performance management sustains an ongoing pursuit of perfection, instilling an ongoing urge for improvement and growth. This drive to progress is linked to the belief that stagnation is undesirable, leading to the creation of goals aimed at reinforcing dedication and continual advancement (Sullivan et al., 2021:10).

Perryman and Calvert (2020) scrutinise data collected from teacher graduates spanning five years to explore motivations for entering, remaining, or leaving the teaching profession. Their analysis searches for the reasons underpinning individuals' decisions to become teachers, the discourse surrounding this choice, perceived challenges, and potential factors influencing their leaving the profession. Despite teachers' awareness of workload challenges, a major factor contributing to attrition and possible future leaving is the type of workload. A noticeable sense of disappointment emerges between the anticipated ideals of teaching and the actualities formed by the demanding workload, closely tied to the ideas of performance and responsibility. Even though teachers start their careers with noble intentions, the imposition of target-oriented control in their day-to-day routines dampens their initial enthusiasm.

The presence of performance targets, performance management systems, and what Ball (2003:220) terms a "baffling array of figures, indicators, comparisons, and forms of competition" undermine teachers' sense of self-worth and introduce subtle social control through data-driven evaluation, monitoring, and control mechanisms. This erosion of their convictions weakens their agency and impacts their professional identity. Such systemic pressures spoil teachers' ambitions and prevent them from reaching their full potential. Hence, it is unsurprising that "almost half of all teachers contemplate leaving the profession due to the institutional pressures of standardised testing and its adverse effects on students, classrooms, and curricula" (Gray & Seiki, 2020:8).

The literature review within the performativity segment stems from a post-data analysis stage, seeking to construct a comprehensive framework to conceptualise the broader impacts of performance management in this study. This review, driven by themes originating from the data, highlights relevant aspects of performativity. Since the inception of the concept of performativity in education in 2003, there has been an exponential wave in literature investigating this subject. This examination highlights how accountability models place an overwhelming emphasis on teachers' engagement in data generation, analysis, utilisation, and

internalisation, consequently fostering a distinctly data-driven orientation. Data are now woven into teaching practices, self-assessment, and validation of outcomes.

However, this increasing dependence on data also leads to a loss of teachers' independence, sense of self, and influence. This is because the main purpose of performance management is to address perceived weaknesses in teaching methods. Within the framework of neoliberal changes, this data-focused approach simplifies complex educational dynamics, disregards the comprehensive growth of students, erodes trust, and overlooks specific contextual details. New teachers, especially, face difficulties when reconciling their original idealistic ambitions with the prescribed requirements brought about by performance management systems. As a result, it is not surprising that disillusionment, caused by the burden of accountability-related workloads and government rules, significantly contributes to teachers contemplating leaving the profession.

The idea mentioned above aligns well with the themes discovered during the data analysis, connecting directly with the existing literature about performativity. This alignment creates a broad and all-encompassing concept that effectively captures the foundational framework of the study.

3.7 Conceptual Framework

The primary focus of this research, through the unit of analysis of the teacher, explored teacher's experiences of performance management in private-public partnership schools in the WC. The incorporation of international studies on PPP schools, encompassing concerns, policies, rationale, and governance, serves to contextualise the study's framework. Emerging themes from both international studies and local literature underscore the significance of governance, autonomy, transparency, accountability, and teacher voices. These themes, identified in the works of Tilak (2016), Fiske and Ladd (2020), and Verger and Moschetti (2017a, 2017b), among others, offer crucial insights into the study's parameters. Furthermore, the local context is illuminated by authors such as Feldman (2020), Schäfer (2015), Harrison (2017a, 2017b), and Fredericks (2015a, 2015b), providing a conceptual foundation for comprehending the motivations, steps, governance, and concerns surrounding the new education reform of collaboration schools in the WCED. This synthesis, combined with international studies, shapes a contextual framework that blends global research findings and local perspectives on insights, challenges, knowledge, and information about educational private-public partnerships. Here data collection is guided towards gathering information form a PPP.

A second crucial element and lens for the study centres on governance, particularly performance management, as a governance, accountability, and control aspect. Performance systems for development or control exist uneasily together and provide difficult dynamics that organisations must navigate. Although governance embraces several management aspects within education, to narrow the focus, performance management was utilized as a core governance aspect to research. Therefore, data collected in the PPP related to the performance management aspect of governance, its systems and effects within a collaboration school.

The study's broader governance perspective, particularly performance management, as a complex element that combines accountability and control. Referencing authors such as Mosoge and Pilane (2014) and Cardno (2012), the study explored various models and traits of performance management systems, investigating how they are put into action, their consequences, and their alignment with organisational aims. The dimension of governance is illuminated by authors and scholars such as De Clercq (2008) and Parcerisa et al. (2022), who delve into the societal and logical underpinnings of performance management. The crucial connection between leadership and performance management also comes to light, as highlighted by authors such as Hartinah (2020), Aguinis (2019), and Bulawa (2014). Their works underscore the essential role of school leaders and how their involvement affects the outcomes of performance management systems. This interplay among governance, leadership, stakeholders, challenges, and outcomes adds another essential layer to the study's contextual framework. When considering these interplaying layers to performance management they can be divided into two camps those relating the policy and process of performance management and those relating to the effects and outcomes of performance management, ensuring that the study considered all interplaying layers and stakeholders when researching performance management in a collaboration school.

Considering the effects of performance management, the study investigated motivation, teacher stress, and emotional labour, as guided by UNESCO (2017), Tseke (2010), Holmes (2005, 2018), and others. These insights pave the way for understanding the potential impact of performance management on teachers, encompassing both positive and negative aspects. Literature read on these effects guided the data collection and analysis to be aware of similar effects that may present in the research study.

However, after examining the data, it became clear that the study needed a broader framework to encompass the observed impacts. The notion of neoliberal performativity, explained by Stephen Ball (2003) and echoed by present-day writers such as Lewis and Holloway (2019),

Gray and Seiki (2020), Power and Parkes (2019), and Singh (2018), emerged as the encompassing structure. This concept aligns with the effects found in the data analysis, effectively anchoring the study and offering a unified synthesis that underscores the study's importance within the conceptual framework. The emerging conceptual framework can therefore be visualised as follows:
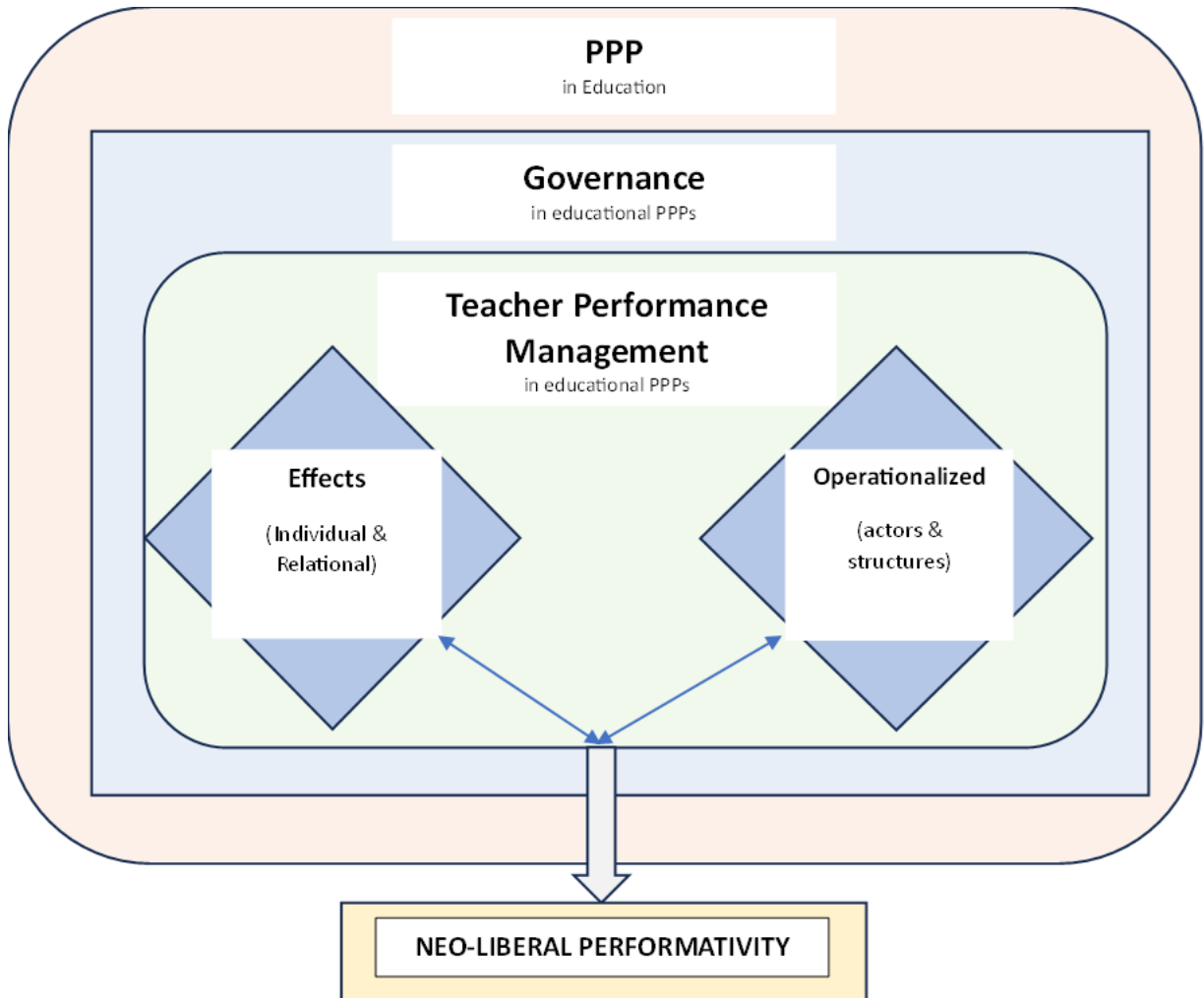
Figure 3.2: Conceptual Framework

This chapter provides and overview of the literature relevant to the study. Guided by the research questions and objectives, the chapter comprises of four sections notably an overview PPPs from an international and South African perspective. Secondly performance management is unpacked including its processes, governance, methods, leadership and management. The following section delves into the ramifications of performance management on teachers' motivation, stress, and emotional labour. Subsequently, the concept of "performativity" is introduced as a macro-level outcome, furnishing a framework for interpreting the empirical findings. Together, these sections constitute the conceptual framework that directs the study. The following chapter provides the reader with information on the study research design and methodology.

CHAPTER FOUR
RESEARCH DESIGN AND METHODOLOGY

4.1 Introduction

This chapter discusses the framework of research design and methodology used in this study. The study aimed to understand teacher experiences of performance management in collaboration schools. It aimed to uncover teachers' perspectives on the implementation and effects of the various accountability systems as they operate in the school. This methodology chapter contextualises the underlying assumptions and design strategies that underpinned this study and guided its research. The chapter begins by explaining the research philosophy and rationale behind selecting the research case study inquiry, aligning with the relevant ontological and interpretive paradigms. Subsequently, it describes the process of site and participant selection, data collection, and data analysis methodologies for subsequent discussions. To ensure trustworthiness, the study defines areas of credibility, transferability, dependability, confirmability, and reflectivity that relate to the methodology used. Lastly, the chapter addresses ethical considerations, the researcher's positionality, and study limitations.

4.2 Research Philosophy

A research paradigm represents the worldview and beliefs about the social world. One's perception of the world significantly influences the research approach (Bertram & Christiansen, 2014:22). A paradigm dictates the acceptable methods for research, inquiry nature, question types, and data collection and analysis procedures (Bertram & Christiansen, 2014:22). Positioning research within a paradigm ensures that the researcher reflects on the philosophy that provides the foundations for the study. The researcher in this study embraced the interpretivist paradigm as explained below.

The ontological assumptions are the starting point of all research. If followed logically, they give rise to methodological considerations (Grix, 2019; Cohen et al., 2007). The ontological position of a researcher is implicit before undergoing any research. This stance defines how the researcher perceives the construction of the world and its crucial social components. Objectivism, or foundational ontological positioning, posits that social phenomena and their meanings exist independently of social actors (Grix, 2019:59). Interpretivism or anti-foundational positioning holds alternatives where social actors are continually shaping social phenomena and their meanings (Grix, 2019). As this study sought to establish, views and effects, it is well positioned within the interpretivism stance.

Research paradigms arise from a researcher's ontological position and philosophical foundations. The researcher's worldview impacts their understanding and approach to researching the world. Within this study, three overarching paradigms – positivism, critical theory, and interpretivism – are presented. The subsequent sections show the alignment of this research to the interpretive paradigm.

Positivism, with historical roots dating back to Ancient Greece, has fostered numerous social inquiry approaches (Cohen et al., 2007; Grix, 2019). Positivists believe that the scientific procedures of the natural sciences can be adapted to social sciences (Grix, 2019; Cohen et al., 2007). Positivists position themselves as observers of social reality, seeking patterns, causes and conclusive outcomes enabling causal statements regarding research findings. They look to explain rather than understand social science through analysis, predications and law-like generalisations based on "fact" (Cohen et al., 2007; Grix, 2019). Criticism of positivism focuses mainly on the reductionist view of the approach which disregards inner experiences, choice, freedom, subjectivity, and individuality that are inherent in studying human beings and their behaviour (Cohen et al., 2007:17).

Interpretivism, a broad term, emerged as an anti-positivist stance (Bertram & Christiansen, 2014; Grix, 2019). Interpretive researchers consider that our "reality consists of our subjective knowledge of the world, and they assume an inter-subjective epistemology and ontological belief that reality is socially constructed" (Thomas, 2010:295). Jonathan Grix (2019:75) notes the development of interpretivism in response to the over-dominance of positivism.

Many authors and researchers focus on explaining these two binary paradigms, neglecting intermediate social research options, as they are in direct opposition to each other. Most research is conducted in indeterminate areas on the periphery of paradigms, challenging clear categorisation. However, you cannot combine interpretivist and positivist paradigms as their underlying assumptions are fundamentally logically incompatible (Grix, 2019:77).

Interpretivists focus on understanding human behaviour – a process that is subject to progression; they reject the notion of a singular truth about the social world, stating instead that people create it through their many ever-changing experiences, interpretations, and situated activities (Bertram & Christiansen, 2014; Cohen et al., 2007).

Critical theory regards the polarised positivist and interpretive paradigms as incomplete in their representation of the social world. These paradigms neglect political and ideological contexts where research is not solely about understanding situations but about actively effecting change

(Cohen et al., 2007). Scholars working with this paradigm combine an interpretive focus of understanding with the explanatory drive of positivism (Grix, 2019:79). Bertram and Christiansen (2014:28) explain that, in the critical paradigm, social reality is shaped by dynamics such as political, cultural, and economic climates in which a researcher operates. Consequently, researchers cannot remain objective or neutral towards the study and its participants. Central to the critical paradigm is an understanding of power dynamics within society, which are not readily observable. Research within this paradigm aims to liberate the disempowered, fostering a more just, equitable, and democratic society (Cohen et al., 2007; Betram & Christiansen, 2014). Therefore, critical theory looks at the interests at work in a situation and interrogates the legitimacy or illegitimacy of the interests towards the democratic service of equality, power, and freedom (Cohen et al., 2007:26).

Considering that the interpretive approach looks at understanding social constructions and human behaviour, and this study aimed to understand and describe teacher experiences in collaboration schools where the researcher assumed the role of primary data collector and analyst, the qualitative research follows an inductive, rather than deductive, approach. It is evident that this study aligned with the *interpretive paradigm* (Cohen et al., 2007; Grix 2019).

The study involved the interests of all stakeholders, with the hope that the research will aid in the being meaning to the human behaviours and social constructs of teachers working in collaboration schools. The next section explains the research design used.

4.3 Research Design

"Every type of empirical research has an implicit, if not explicit, research design. In the most elementary sense, the design is the logical sequence that connects the empirical data to a study's initial research question and, ultimately, its conclusions" (Yin, 2009:26).

The following section provides clarity into the elements of the study's research design and the rationale behind their adoption for this study.

Quantitative and qualitative research methodologies differ significantly. This study employs qualitative research methods, as they align more closely with the specific requirements and objectives of the study.

Qualitative research methods are suitable when the research question necessitates factual

data, general probabilities, or the isolation and definition of variables linked to hypotheses (Hammarberg et al., 2016). The replication of qualitative research adds to its credibility often through the statistical ability to generalise results (Grix, 2019:110). The researcher in quantitative research is often seen as detached from the research, which uses specific language and techniques that apply to numerical data to produce precise numerical information (Grix, 2019:111). Malterud (2001:483, cited by Grossoehme, 2014:1) describes qualitative data as

> "the systematic collection, organisation, and interpretation of textual material derived from talk or conversation. It is used in the exploration of meanings of social phenomena as experienced by individuals themselves, in their natural context."

In contrast qualitative tends to be abstract allowing for general descriptions and causal hypotheses as it seeks to measure and analyse matters that are easily replicable (Grix, 2019:109). Qualitative research approaches a phenomenon as a construct that is socially created by people as they engage with each other, their environment, and the world. Reality is complex and continuously evolving. The world is not fixed or singular (Merriam, 2002:4). A qualitative interpretive approach aims to explore and address questions concerning individuals' understandings, experiences, interactions, perceptions, and the significance these hold for them (Merriam, 2002; Hammarberg et al., 2016).The qualitative researcher is not a detached and disinterested observer but an active participant whose interactions with subjects influence, and are influenced, by the data. This often leads to more focused studies (Grossoehme, 2014; Grix, 2019). This close researcher-subject connection expands ethical considerations and confidentiality concerns, particularly in qualitative research methods (Grix, 2019:113).

Therefore, a *qualitative approach* was used in this research that looked at understanding the experiences of the participants (teachers) in connection to their work environment. The interpretive qualitative research sought to understand, contextualise, and garnish further meaning for those vested in collaboration schools, which as discussed above leads itself to a non-fixed or singular socially constructed phenomenon. It examined how teachers in collaboration schools experienced performance management and the effects of their experiences aligning with Merriam (2002) view that qualitative interpretive research aims to explore and understand experiences, interactions and perceptions. The researcher was an active participant in the research and not detached as is often the case with qualitative researchers, utilising semi-formal interviews for the data collection. The ensuing analysis was enriched and informed by field notes and general documentary sources.

Qualitative data collection often takes the form of spoken and written mediums utilising interviews, observations, focus groups, field notes, photographs, videos, voice recordings, policy documents, minutes of meetings, textbooks, legislature etc. (Bertram & Christiansen, 2014; Grix, 2019; Grossoehme, 2014). Many studies combine qualitative and quantitative research methods, although Hammarberg et al. (2016) caution ensuring the compatibility of each method's theory and valid reasons for their use, rather than mere inclusion for the sake of it. These methods can run consecutively or concurrently, with one potentially playing a more substantial role. They can corroborate, elaborate, demonstrate complementarity, or even highlight contradictions. Each method has its own merits contingent on the research design (Hammarberg et al., 2016).

Furthermore, the study used a *case study design*. Merriam (2002:8) explains that a case is a single entity, a thing or unit that has boundaries. It can be a person, group, programme, organisation or even a policy. The case study method is particularly suited for research aiming to explore the how or why of a social phenomenon, where the answer requires extensive and in-depth descriptions to relay a definitive understanding from a holistic view with meaningful characteristics of real-life events (Yin, 2009:2).

The case study the practical, explanatory, and descriptive nature links well with the interpretive design. This alignment enables the identification of emerging patterns and relationships through comparisons (Cohen et al., 2007:21). Given the nature of the research questions, which sought to understand teachers' experiences in performance management through holistic descriptions and analysis of a phenomenon, the case study approach emerged as the most appropriate. A case study provides a systemic way to collect, analyse and report data and findings with clarity (Yin, 2009:1). With the teacher as the unit of analysis in this study, the case study approach allowed for a variety of data-collecting methods; some of which were adopted during this study to ensure thick descriptions of the phenomena under research (Yin, 2009:3).

The study adopted an exploratory case study, which Merriam (2002:5) describes as "an intensive, holistic description and analysis of a bounded phenomenon such as a programme, an institution, a person, a process, or a social unit". Case studies also facilitate the examination of current events when behaviours cannot be controlled. What underlines the advantage and distinctiveness of the case study method is its capacity to draw from various forms of evidence, including historical documents, interviews, and observations, exceeding the limitations of many other methods (Yin, 2009:85). This equips the researcher to not only probe participant behaviours but also to consider external factors such as history, legislation, culture, and

institutional dynamics (Yin, 2009:85). In this study, such an approach is advantageous as it incorporates insights and influences from the research environment, context, and regulations to enhance the understanding of their effect on the research question, data, and conclusions.

A case study design provides the researcher with the options of using single or multiple case studies, with either single units of analysis or more than one unit of analysis (Yin, 2009:23). However, for this study, a single case study design was used. The single case represented a PPP school. Given the considerations of capacity, resources, and time, a single case study allowed all resources to be focused on gaining an in-depth understanding of teachers' experiences of performance management at a collaboration school therefore providing contextually rich evidence to address the research questions.

The rationale for the use of qualitative research and a case study design has been explained above. The next section describes the sampling methods used for this research.

4.4 Sampling

The quality of a study depends not only on its suitable methodology, instruments, and analysis but also on the appropriateness of its sampling strategy (Cohen et al., 2007:100). Sampling decisions are made early in the research process and sampling decisions are often influenced by cost, time, availability, accessibility, and frequency. These factors may prevent researchers from collecting data from the entire population, leading them to gather information from a smaller, representative group (Cohen et al., 2007:101).

Two main methods of sampling are: random sampling (probability sampling) and purposive sampling (non-probability sampling) (Bertram & Christiansen, 2014; Cohen et al., 2007). These methods can also be stratified in nature. A third method of sampling is convenience sampling. In random sampling, every member of the population has an equal and known chance of being selected. Researchers' selection methods ensure participants are selected randomly, without any specific reason for inclusion that distinguishes them from other members of the population (Bertram & Christiansen, 2014; Cohen et al., 2007).

Merriam (2002:4) explains that qualitative researchers, concerned more with understanding meaning from participants' perspectives than with quantities or frequencies, are not as constrained by random sampling requirements. Instead, qualitative studies select a sample from which the most can be learnt concerning the phenomenon under study as they aim to understand the meaning from the perspective of the participants. This is known as "purposive

sampling for information-rich cases for in-depth study" (Merriam, 2002:12). Purposive sampling also includes criterion sampling, where participants or groups are selected based on specific study criteria (Bertram & Christiansen, 2014:61).

Both the above sampling methods can also use stratified sampling where the research population consists of subgroups and subsamples that need to be included to validate the population sampling (Bertram & Christiansen, 2014:61). Lastly, convenience sampling occurs when researchers choose a sample for their study based on convenience and accessibility, without a purpose or randomness (Bertram & Christiansen, 2014:61). For this qualitative study, which aimed to collect in-depth rich information through case studies, the researcher used *purposive sampling* methods with criterion sampling for the site selection as well as for the teachers and other participants.

4.4.1 Research Site Sampling

During the sampling phase of this study, a total of 11 collaboration schools were present in the WC. The selection of the site or school for the study was guided by specific criteria. Firstly, the researcher opted to focus on High Schools as a key criterion for the research and purposive sampling. Drawing from personal High School teaching experience and involvement with an NPO supporting High School students, the researcher believed this familiarity would enrich data analysis and contextual comprehension.

Secondly, the collaboration school had to be partnered with The Learning Foundation. The researcher possessed knowledge of the foundation's philosophy and founding partner, which facilitated site access. This familiarity promised deeper insights and enhanced comprehension of the research phenomenon. The final site selection criteria in the purposive sampling aimed to work with a new collaboration school. This school would have solely operated under the SOP and would not have transitioned from a public school to a collaboration school, signifying a shift from WCED governance to SOP governance. This provided the researcher with insight into the establishment of new policies and governance structures that are implemented from the foundation of the school with the SGB (and therefore the SOP) as the employer. In contrast, existing schools might still retain WCED policies and governance structures, particularly regarding performance management.

Given the criteria, there was only one school that met all the researcher's needs as shown below:

Table 4.1: School site selection

School Name	Level	Type	SOP
Tree Academy	Primary	New	Seed
Point Primary	Primary	New	Seed
Point High	High	New	Seed
North High	High	New	The Learning Foundation
Crossing Primary	Primary	Existing	People's Trust
Blossom Primary	Primary	Existing	People's Trust
Light High	High	Existing	The Learning Foundation
Future High	High	Existing	People's Trust
Earth Primary	Primary	New	The Learning Foundation
Landing Primary	Primary	Existing	Endowment Fund Trust
Faith High	Primary	New	The Learning Foundation

The data presented in the table above, along with all collected information, employed pseudonyms. This protective measure shielded the identity of volunteers who willingly participated in the study anonymously. Further discussion on this aspect is provided in section 4.9 Ethical Considerations.

To ensure confidentiality and anonymity, all participants were furnished with an information letter. This letter assured them, as stated: "This research, approved by the Ethics Committee of Cape Peninsula University, will uphold strict confidentiality and secure data storage" (Appendix D: Information letter). Additionally, participants were reminded of this commitment during data collection procedures and at the onset of their interviews. Furthermore, the participant's consent form repeated this promise "Please note – your name or any identification marker will not be included in the final thesis document or any reports. This is purely for ethical and consent considerations. You will remain anonymous for the research study" (Appendix E: Participant Sample Consent Form). Consequently, any markers revealing identity, such as school names, operating partners, or participants' names, were omitted, and pseudonyms were employed.

4.4.2 Research Participant Sampling

Initially, teachers within collaboration schools were invited to participate in the interviews voluntarily. At the commencement of data collection, only a limited number of teachers offered to volunteer. Consequently, the researcher adopted the snowball sampling technique to expand the pool of research participants. Snowball sampling involves identifying a small group of individuals who meet the study's criteria or volunteer and possess the necessary characteristics. These individuals are then enlisted as informants, identifying additional volunteers, or facilitating the researcher's contact with potential participants for study inclusion (Cohen et al., 2007:116).

Through a combination of volunteering and snowball sampling, a group of participants were identified. This group comprised four teachers, one of whom served as the SGB representative, an HOD, the principal and the school deputy. Ensuring the involvement of school management team members and an SGB representative was paramount due to their invaluable insights into governance procedures directly associated with the SOP. Furthermore, the SMT members provided insight into how the school operationalised performance management aligning the SOP's requirements with the school's systems and capacities. Below is a summary of the participants and their relevant attributes.

Table 4.2: Summary of participants attributes

Name (Pseudonym)	Position	Gender	Race	Teaching Experience	Teaching time at North High
1. Amina	Teacher	Female	Coloured	2 years	1 month
2. Jen	Teacher	Female	White	10 months	10 months
3. Emily	Teacher	Female	White	1 month	1 month
4. Pete	Teacher/SGB	Male	White	10 months	10 months
5. Dan	Principal/SGB/SMT	Male	Coloured	20 years +	3 years (start)
6. Zara	HOD/Teacher/SMT	Female	Coloured	10 years +	2 years
7. Yasmin	Deputy/Teacher/SMT	Female	Coloured	10 years +	2 years

Therefore, as shown above, a minimum of seven interviews were conducted within the selected collaboration school site. Moreover, due to Covid-related restrictions and scheduling complexities encountered during data collection, nearly every participant underwent two interview sessions. The researcher felt that this allowed for information-rich data gathering

from key informants of the study. The study used the teacher as the unit of analysis and focus point, where the duality of position within SMT, SOP and SGB provided further in-depth information, cross-referencing and trustworthiness to the study as discussed further below.

4.5 Research Techniques

According to Kitwood (1977, cited by Cohen et al., 2007:153), effective interviewing involves respectfully posing well-constructed questions, fostering rapport, and demonstrating sincerity and motivation. This study used semi-structured interviews for data collection.

To have accurate data one needs appropriate and relevant questions aligned with the research objectives. Therefore, a reliable interview instrument that facilitates the necessary data retrieval is essential (Cohen et al., 2007:150). To start, the researcher needs to identify the variables they are trying to measure and determine whether open or closed questions are suitable, along with aspects like answer alternatives, scale types, question formats, categories, response modes, and desired data types (Cohen et al., 2007:151).

Using a semi-structured interview, the researcher used topics and categories to guide the interview through open-ended questions. These questions included prompts but the exact wording, sequencing, and responses respected flexibility (Cohen et al., 2007:361). The interview schedule instrument (see Appendix F: Teachers Semi-Structured Interview Questions) was created from the research questions, aims and objectives of the study. The techniques and questions were selected to enhance accuracy through rapport-building and addressing potential queries. Initially, the researcher gathered participants' biographical information (see Table 4.2) to establish rapport and gather contextual data relevant to the research question.

The interview instrument structure progressed to open-ended questions about performance management. This section explored the school's systems, procedures, outcomes, observations, impact, and perceptions concerning the performance management system (linked to research sub-questions on operationalisation and effects). Additionally, questions related to continuous professional development and teaching experiences were included, as this study was part of a broader research project on private-public partnerships in South African education. Nonetheless, the focus remained on the teacher performance management system due to its direct relevance.

To ensure relevance, acceptability, and data adequacy, the instrument underwent piloting. The

pilot consisted of three external teacher interviews. After each pilot interview, the instrument was reassessed, restructured, and updated to ensure that it was best suited to gather accurate and relevant data for the study. Changes, such as including definitions, basic purpose of main topics, additional prompts to assist with flow and type of information needed, were included.

Additional restructuring occurred after the first on-site interview as it revealed that the collaboration school utilised both the WCED IQMS and Data Driven Dashboard (DDD) systems for performance management. The instrument was then updated to accommodate data collection on both systems and their integration.

With instrument refinement complete, the researcher employed the interview schedule to collect data, as detailed below.

4.6 Data Collection

Bertram and Christiansen (2014) explain that research is grounded on empirical data collection. Data refers to the evidence or information that the researchers collect to answer their research questions (Bertram & Christiansen, 2014:71). One of these techniques that can be utilised to collect data is an interview. An interview is an exchange of views between two or more people on a certain topic (Cohen et al., 2007; Bertram & Christiansen, 2014). Unlike a casual conversation, interviews possess a predetermined agenda, with one participant predominantly posing questions (Cohen et al., 2007; Bertram & Christiansen, 2014). Interviews can either be structured, unstructured or semi-structured. Semi-structured interviews, used by this study are positions between structured and unstructured interviews.

In structured interviews, pre-defined questions are presented to respondents in a specific order, often requiring open or closed responses. In structured interviews the responses are meticulously recorded, and this process is replicated across interviews (Grix, 2019; Bertram & Christiansen, 2014). Conversely, unstructured interviews begin with an introduction to the main research question, allowing respondents to elaborate freely. The interviewer may interject with further questions as the conversation unfolds relying on the respondent's input (Bertram & Christiansen, 2014:82).

Semi-structured interviews grant interviewers a set of questions to guide them, however, these questions need not adhere to a fixed sequence. This method's appeal lies in its flexibility, allowing for spontaneous exploration of emerging matters of interest during the interview. Additionally, it creates a relaxed atmosphere for respondents (Grix, 2019:121). Thus, this study

favoured the semi-structured interview approach, elaborated upon below.

4.6.1 Semi-Structured Interviews

Semi-structured interviews were used as the *main and principal means of data collection* to interview the teachers, school management team representatives, and school governing body members to gather insights in relation to the research question which sought to understand teachers' experiences with performance management systems in collaboration schools.

An interview is useful in qualitative research and can be defined as the process used to gather evidence by a researcher where two people engage in a conversation that is introduced by the researcher for the set purpose of gathering information (Cohen et al., 2007:361). In this study, the semi-structured interview approach facilitated guided conversation, enabling the researcher to adapt questions in response to the flow of dialogue, ensuring unbiased exploration, clarity, and depth (Yin, 2009:89). The semi-structured interview encompassed a series of questions and topics tied to research inquiries (see Appendix F: Teachers Semi-Structured Interview Questions).

The flexibility inherent in the semi-structured interview enabled comprehensive exploration through prompts. Prompts allow the interviewer to get clarity on topics and ask further questions to get the responders to elaborate, give detail, or qualify their answers thereby providing richness, depth, honesty, and comprehension to the interview ensuring its success (Cohen et al., 2007:363).

The semi-structured interview also allowed the interviewer to establish the appropriate atmosphere and rapport with the participants so that the participants could feel safe, secure, and talk freely (Cohen et al., 2007:361). Ethical dimensions, purpose, and study details were communicated to participants, developing a comfortable environment. The initial questions centred on the participants, promoting a flexible dialogue. Lastly, the semi-structured interview process allowed for the adapting of the instrument during interviews maintaining the accuracy, relevance, and clarity of data.

Face-to-face and online semi-structured interviews were conducted with the seven participants from North High Schools. Beyond language, interpersonal, communication and emotional aspects necessitated active listening, enhancing data collection (Cohen et al., 2007:363). To accommodate participants' availability and COVID-related constraints, interviews were conducted at suitable times for the participants. While an initial face-to-face meeting

established rapport, subsequent interviews often moved online due to COVID restrictions. COVID limitations also led to time constraints during interviews as teachers' admin lessons were only 30 minutes long, necessitating second sessions. However, this approach fostered rapport and enriched data. Conducted in English, interviews were audio-recorded with participants' consent, followed by verbatim transcription for data analysis.The above section unpacked the methods and process that the researcher used in the collection of data. The next section provides further information on the data analysis process.

4.7 Data Analysis

In qualitative research, data analysis begins alongside data collection, coinciding with the first interview and document. This approach allows researchers to identify emerging concepts, identify themes and categories, and delve deeper as required – enabling necessary adjustments, as demonstrated in this study. Delaying analysis until the data collection's conclusion would miss the opportunity for more robust and comprehensive data (Merriam, 2002:14).

Coding arranges large amounts of textual data into concise categories, guided by their content (Hsieh & Shannon, 2005:1279). Extracted themes, patterns, or categories are reflected in the textual content or source documents. This study employed selective coding, wherein codes related to research questions became emerging themes. Subsequently, thematical coding combined selected codes into expansive codes and distinct category sets, fostering interconnections. This process directed the researcher towards drawing conclusions concerning content and its analysis (Hsieh & Shannon, 2005).Data acquired from interviews, documents, and interview notes underwent transcription, rendering it as discursive content for subsequent analysis. The data were interrogated and meticulously examined, coded line by line to get a deep understanding of participants' expressions until themes, patterns and categories started to emerge from the text. Themes and patterns that related to the research questions were then selected for further exploration (selective coding). Subsequently, smaller themes were merged and categorised into larger theme sets when the data themes related to each other (thematical coding).

Inductive research refers to the process where conclusions are made about a study directly from reflections of the observed evidence. In inductive approaches, raw data collected from the study are put into themes, patterns and categories that emerge leading to a theory that can be further examined and explained through general conclusions (Bertram & Christiansen, 2014:117). In contrast, deductive approaches rely on a theoretical framework or steps,

concepts, and elements beforehand that are used to frame the study, with themes and categories being predetermined and used to organise or classify the data (Bertram & Christiansen, 2014:117). Deductive theory shapes research hypotheses while data collection seeks to verify or refute them (Grix, 2019:106). In reality, most social research includes elements of both inductive and deductive strategies, leading several authors to argue that all research is *retroductive* as an interplay of induction and deduction processes (Grix, 2019:107).

This study, with its alignment to *selective coding and thematic coding* approaches, utilised *inductive research methods* during the data analysis process. The themes identified from the data analysis were guided by the research questions to add meaning and sense to the data, get a better understanding and ultimately develop empirical knowledge of teachers and their experiences working in collaboration schools, particularly regarding the performance management systems in these schools.

Adapted from Cohen, Manion and Morrison (2007), the data collected were analysed in the following steps:

- Transcribing all interviews

- Skimming, reading, and interpretation of transcriptions

- Line-by-line analysis

- Content and selected analysis of codes relevant to research questions

- Summary of selected codes against semi-structured interview questions

- Content and thematical analysis of interview codes and summaries

- Generating units of meaning and ordering these units into overarching themes

- Identifying any biases and researcher influence

- Structuring the narratives to describe the contents and provide input into the themes

- Interpreting the findings and data with linkages to the main and sub-research questions

Please see Appendix H for an example of data the selective coding and thematic coding analysis.

Each participant interview was transcribed and read word for word, sentence by sentence to allow for a deep understanding of the participants' meaning. This data were coded and studied by the researcher, interrogated and meticulously examined, and compared to other coded sheets, noting patterns, trends, similarities and themes. These were revised, summarised, revised again, unified, and thematised. This is shown below.
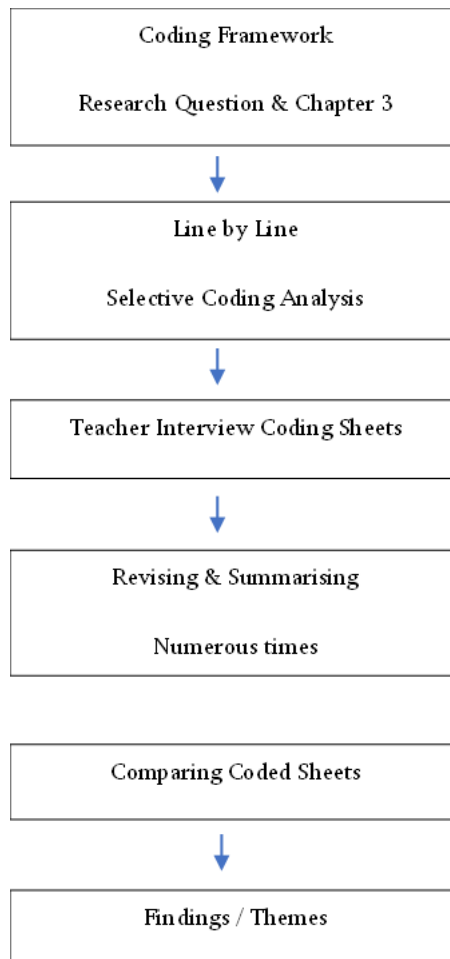

Figure 4.1: Data Analysis

The section above unpacked the process of data analysis. The following section describes the research methods used to ensure the trustworthiness of the study.

4.7 Measure to Ensure Trustworthiness

Connelly (2016:435) defines the trustworthiness of a study "as the degree of confidence in data, interpretation, and methods used to ensure the quality of a study." Researchers should strive to create practices and procedures that compel reading to deem the study to be of worth. The criteria for the trustworthiness of qualitative research, outlined by Lincoln and Guba (1985,

cited by Shenton, 2004:64) still hold recognition among most qualitative researchers today. These include *credibility, dependability, confirmability, and transferability* (Shenton, 2004:64).

4.7.1 Credibility

Credibility, or internal validity, establishes a sense of truth and confidence in the study and how consistent the finding is with reality (Shenton, 2004:64). A qualitative study attains credibility when its results faithfully represent contextual descriptions and are affirmed by those who share the same experiences as the study phenomenon.

The researcher ensured credibility through a variety of measures such as the use of *triangulation*. Cohen et al. (2007:143) describe triangulation as the use of two or more means or viewpoints for collecting data when studying aspects of human behaviour. This study employed *focal point triangulation* by interviewing not only the teachers on their perceptions of performance management but also the school governing body members and representatives from the school management team such as the school deputy and school principal.

Furthermore, the researcher provided substantial descriptions of the data analysis and findings process, using verbatim quotations to illustrate themes and points to support the research interpretations (Hammarberg et al., 2016:500). Lastly, the researcher invested ample time with participants and the subsequent data, to allow for unrestricted responses, probes, prompting and coding to ensure clarity and validity. This approach facilitated an in-depth understanding of the study phenomenon, enhancing meaningful data analysis.

4.7.2 Transferability

Transferability refers to a study's external validity and applicability; it relates to a study's relevance beyond its immediate context and often refers to its sampling size and methodologies (Hammarberg et al., 2016:500). Due to its nature, a qualitative study is usually limited in size, specific to an environment or individual occurrence. Therefore, generalising the study's findings to a broader population is impractical. However, an understanding of the phenomenon is gained gradually through several smaller in-depth studies that collectively contribute to the whole image (Shenton, 2004:70).

In this study, the researcher has shown and explained in detail all aspects of the study sampling, including sites, data collection, and analysis. This transparency empowers readers to evaluate the information's transferability to other contexts (Shenton, 2004). Furthermore,

through the inclusion of a context chapter, alongside the literature review and thorough findings discussions, the researcher provides sufficient descriptions, contextual information, thick rich descriptions, and an explanation of the phenomenon. This allows the reader to understand the phenomenon thoroughly and facilitates comparisons with similar research and occurrences (Shenton, 2004:70).

4.7.3 Dependability

Dependability refers to the reliability, steadiness, and consistency of the data while acknowledging their instabilities. Credibility and dependability are closely related and overlapping methods that can be used to ensure both (Shenton, 2004:71). This does not imply that identical results would manifest in different contexts, but rather that other researchers, armed with the same data would find similar patterns (Hammarberg et al., 2016:500).

In this research, dependability was achieved through detailed record-keeping, electronic copies of the interviews, transparency, and consistent interpretations to ensure an accurate account of events and information. The study provided an elaboration of the methodology process, sampling and instruments created and used. Furthermore, overlapping methods of cross-checking, triangulation of interview participants and the audit trail of the study have been explained for scrutiny, enhancing the study's dependability.

4.7.4 Confirmability

Confirmability addresses the researcher's objectivity. The study's findings must be from the participant's experiences, concepts, ideas, and information, and not the researcher's biases (Shenton, 2004). Triangulation assists in mitigating bias, while detailed methodological descriptions offer the readers insight into how the constructs emerged from the study. An "audit trail" allows readers to systematically trace the research's trajectory (Shenton, 2004:72).

The researcher can certify confirmability in this study as detailed records and a clear audit trail of notes and analysis have been included in the study. All claims and findings have been grounded in verbatim evidence from collected data, and further substantiated by links to existing research as relayed in the literature review. Lastly, the researcher engaged with supervisors and other researchers to obtain peer review to address potential bias.

4.7.5 Reflexivity

Researchers can substantiate the credibility of their research practices through reflexivity, a process involving self-reflection on their influence on the study (Hammarberg et al., 2016:500). Researchers bring their own backgrounds, presence, and biographies into the research, impacting its dynamics (Cohen et al., 2007). Researchers naturally exist within the social world they study, which is already interpreted by its actors, potentially undermining objectivity. While eliminating these effects is impossible, reflexivity calls for acknowledging and disclosing these influences, and remaining very aware of their impact on the study.

Throughout this study, the researcher consistently engaged in self-awareness, reflection, and rigorous assessment of internal biases. Regular self-reflection, discussions, and journaling were employed to ensure the study's trustworthiness. The researcher acknowledged the research paradigm, epistemological and ontological assumptions (as elaborated in the philosophy section), and their implications for the study. Additionally, the researcher recognised the subjective nature of the research methodology by utilising a case study design with semi-structured interviews as a primary data collection tool. Integrity, reflexivity, and diligence filled all stages of the research process, from data collection and analysis to writing. Any concerns regarding bias or researcher influence were promptly shared with colleagues and supervisors for guidance. Regular interactions with seasoned researchers in the field contributed to maintaining reflexivity throughout the study.

4.8 Researcher's Positionality

Positionality is determined by where one stands or situates oneself in relation to others (Merriam et al., 2001:411). These positions can shift influenced by factors that align or differentiate us from those under study. Many discussions exist around the benefits and disadvantages of the researcher being an insider or an outsider of the population they are researching (Merriam et al., 2001:411). The situation is inherently complex where the boundaries between the two positions are not as clearly designated as one would assume. What is often perceived as the insider's strengths, such as easy access and more meaningful exchange, can also create bias, thus creating situations where the insider's strengths can be the outsider's weakness and visa-versa (Merriam et al., 2001:411).

Determining one's position to others is crucial as it determines one's identity, self-perceptions and how these elements stand and rank in relation to others (Merriam et al., 2001:411). In this study, the researcher held an insider status due to their previous role as a high school teacher,

which provided the researcher with knowledge about the WC education systems, particularly in terms of the study's focus on performance management. Furthermore, being born in SA provided a cultural context and understanding of two of the three home languages spoken by the participants, facilitating nuanced communication. However, the researcher also maintained an outsider role, as they were no longer teaching in a WCED school, lacked affiliation with collaboration schools or SMTs, and had no direct ties to the site school's community.

Recognising their roles as interviewer and data collector, the researcher leveraged their insider status for increased understanding, access, care, and rapport. This was balanced with the detachment of an outsider, ensuring curiosity in an approach that encouraged participants to share detailed insights without fear of consequences or alignment. Ethical conduct was maintained throughout interviews and data collection was ethically done without any prejudice, harm, or conflict.

4.9 Ethical Considerations

Cohen et al. (2007:51) define ethics as the sensitive treatment of the rights of others and the respect for human dignity. When planning a study, researchers must address aspects such as informed consent, access, possible sources of tension, problems including privacy and anonymity, ethical frameworks, personal code of conduct, and the responsibility to the research community (Cohen et al., 2007).

Ethics can be seen as the moral principles that guide a researcher during the study, particularly regarding areas such as confidentiality, privacy, anonymity, and legality (Grix, 2019:140). Researchers are duty-bound to respect all study participants, ensuring precise permission is obtained. Clear communication about how information will be gathered, analysed, safeguarded, and used is essential (Grix, 2019:141). In qualitative social studies, a researcher should consider ethical issues such as harm, consent, deception, privacy, confidentiality, and standard of work across all research phases (Grix, 2019:142). In this study, participant anonymity was safeguarded by removing identifying details and assigning pseudonyms for participants, partners, and schools. Interviews were conducted in a secure, private environment limited to the researcher and the participants.

The study, conducted under university auspices, adhered to the institution's research ethical codes. Ethical clearance was obtained through submission to the Cape Peninsula University of Technology Ethics and Higher Degrees Committee (Appendix A: Ethic Approval Letter from CPUT). This step ensured participant well-being and upheld respect, dignity, and

professionalism in research tied to the university. Additionally, as the participants worked within the government education system, further clearance was needed from the WCED (Appendix B: WCED Research Approval Letter). Only after obtaining these permissions did data collection commence.

Participants were fully informed about the study's purpose, data usage, and ethical safeguards. They were explicitly told of their right to withdraw at any point before the final findings and were under no obligation to participate. All participants received a detailed information sheet and signed a consent form (see Appendix D: Participant Information Letter and Appendix E: Participant Sample Consent Form) and were reminded of the ethical considerations at the beginning of each interview process.

Researchers must hold themselves and their work to high professional standards to promote research in pursuit of knowledge and prevent data fabrication or falsification. To mitigate against any false findings, verbatim quotations from the participants substantiated the results. Findings were interrogated through detailed discussions with supervisors and fellow researchers. All data were kept in a secure password-protected folder, on a fingerprint-protected laptop which only the researcher had access to. The researcher was committed to protecting the rights of the participants and ensuring that no harm came to them through reputation, association or any other way linked to this study.

The study was conducted with unwavering adherence to ethical considerations, reflecting the researcher's high standards and morals. Having established ethical groundwork, the following section addresses study limitations and challenges.

4.10 Limitations

Limitations of a study concern possible weaknesses that are out of the researcher's control often connected with the chosen design and methodology, such as with case study designs. Researchers need to be aware with case study research that each case is unique and that the researcher could become too absorbed into the phenomenon, losing objectivity (Yin, 2014).

With qualitative case studies, the generalisation of findings is indeed a limitation. Shenton (2004) suggests that social qualitative research must ensure a proper understanding of the phenomenon under study through rich thick descriptions and details so that the readers can compare the research to other instances. This study offers in-depth analysis, findings, context, methodology, literature review and synthesis to ensure that, although no other situation will be

exactly the same, any researcher working in similar conditions will be able to relate this study to their context and expand on the knowledge provided.

Another limitation of this study was the availability of possible sites to gather the required data. As the collaboration school model is a new concept in the WC, there are not many schools to approach that meet the criteria, resulting in only one remote site. Overcoming this challenge involved securing a workspace at the solely available site, enabling efficient data collection through extended stays during interview days. This on-site presence facilitated insightful observations of the schooling system.

Another challenge occurred regarding the volunteering of the site school staff to be interviewed as research participants. The school had a very small teaching cohort and, combined with political interest in the topic, volunteers seemed hesitant. A case study design with a smaller population was still viable, and the researcher utilised snowball sampling to overcome the challenge and expand the participant numbers, building on existing interviewee confidence and security protocols.

Time constraints restricted comprehensive participant selection and interview tools. However, this study was part of a larger research initiative where SOP members were interviewed and multiple data collection methods, including questionnaires, were employed.

Lastly, COVID-19 impacted the research. The school had only been in operation for a year before nationwide lockdowns and COVID restrictions. Many of the school plans had to be postponed and were rescheduled for implementation in 2023. Had circumstances been different, the participants may have responded another way.

4.11 Chapter Summary

This chapter focused on the research methodology and design used in this study. It unpacked the research philosophy and design providing a detailed explanation of the chosen sampling approach, the development of techniques and instruments, and the data collection. Furthermore, it addressed the unit of analysis and expanded on the data analysis process. This included issues of trustworthiness in qualitative research such as credibility, transferability, confirmability, dependability, and reflexivity. Finally, the chapter addressed ethical considerations and presented the study's limitations.

The next chapter discusses the findings from the study.

CHAPTER FIVE
FINDINGS AND DISCUSSION

5.1 Introduction

The previous chapter discussed the methodology and how the data were analysed. This chapter presents a discussion of the research findings produced from the data gathered for this study and comments on the key themes emerging from the findings as linked to the research question: "What are teachers' experiences of the performance management system in collaborating schools?"

Data were collected from interviews at North School aimed at exploring what the teachers' understandings, encounters and thoughts were on the performance management system as operated in their school. Specifically, data were collected to study how performance management systems are operationalised in collaboration schools and the teachers' perceptions of the effects that performance management had on teachers in collaboration schools. The findings were drawn from seven interviews with four teachers, a Head of Department teacher, a Deputy Head, and the school Principal.

The chapter is structured in sections that follow the study sub-questions to convey the information encountered and the findings of the research into exploring the teachers' experiences on the performance management system in collaborating schools. In these sections, key themes that emerged from the findings are presented and discussed. The chapter draws on data collected from semi-structured interviews and is guided by the following two research sub-questions:

1) What are teachers' views of how performance management is operationalised within the school?

2) How do teachers' perceive the effects of performance management at their school?

The chapter will respond to the research question and its subsequent sub-questions through identified themes, as shown in the table below.

Table 5.1: Research question, sub-question and themes

Research Question	Sub-question	Theme
What are teachers' experiences of the performance management system in collaboration schools?	1. What are teachers' views of how performance management is operationalised within the school?	1.1) Two Systems 1.2) Role of Leadership
	2. How do teachers' perceive of the effects of performance management at their school?	A) Individual Effects 2.1) Effect One: Anxiety and Stress 2.2) Effect Two: Demotivation 2.3) Effect Three: Extended Workload and Administration B) Relational Effects 2.4) Effect Four: Narrow Focus on Learning 2.5) Effect Five: Reflection and Sharing

The chapter is structured in two sections, each addressing a sub-question. The first section examines teachers' perspectives on the operationalisation of performance management within the school to address the question which can be restructured as: "What are teachers' views on how performance management is implemented in the school?" This is achieved through the exploration of two emerging themes. The second section delves into teachers' perceptions of the effects of performance management at their school, tackling the question: "How do teachers' perceive the impacts of performance management in their school?" This section reveals five distinct effects, categorised as either individual or relational impacts.

Regarding the examination of the implementation of performance management within a collaborative school, with specific attention to possible deviations from a standard WCED school system, two predominant themes surfaced. The initial theme reveals the necessity for teachers to navigate dual compliance systems: one aligned with WCED's Quality Management Systems (QMS) and the other aligned with the SOP. The implications of this dual-system scenario are dissected in the subsequent subthemes, addressing the confusion arising from dual-system compliance and the limitation of autonomy due to additional compliance demands.

The second emergent theme sheds light on the role of leadership and management within performance management in collaborative schools. This theme is illustrated through two

subthemes: the management of teacher contracts by leadership and the management's efforts in addressing communication and transparency challenges inherent in this new South African education reform context.

The subsequent section develops upon the findings related to the second sub-question, exploring teachers' perceptions of the effects of performance management at North High School. The qualitative data gathered from interviews provide insight into five discernible themes. These themes are further classified into two categories: effects with personal, subjective impacts on teachers; and those with relational, objectively discernible influences. The initial category, which intimately affects teachers, features heightened anxiety and stress stemming from the perceived implications of the performance management system. Additionally, teachers reported demotivation, an increased administrative burden, and expanded workloads. Ultimately, teachers expressed feelings of powerlessness, reduced agency, and diminished autonomy.

The second category, centred on the impacts related to teachers' interpersonal dynamics, features objective factors influencing teaching and learning approaches stemming from perceptions of performance management. Significantly, a major concern is the system's narrow emphasis on data and student outcomes as the primary gauges of teaching effectiveness. This intense focus on quantifiable measures can reduce both students and educators to mere statistics within the educational system. It is important to acknowledge that the interpretation of these impacts can swing either negatively or positively, depending on individual viewpoints and cognitive reactions. Throughout the study, there were instances where teachers discovered a sense of empowerment through introspection and shared experiences, countering their initial feelings of powerlessness. This reflective and collaborative outcome emerges as the final result gathered from the exploration of the second sub-question.

5.2 Teachers' Views of How Performance Management is Operationalised within the School

This section addresses the initial research sub-question. As explained in the literature review, performance management is not a one-time event. Instead, it necessitates internal integration and ongoing management as a fundamental aspect of organisational operations (Mercer et al., 2010). Effective implementation of performance management hinges on its integration within a structured system. Chapter Three underlines the dynamic interplay between organisational systems, culture, and the mechanisms employed for performance management (Cardno, 2012; Bisschoff & Mathye, 2009). This interaction can be shaped by both formal review processes and feedback mechanisms, as well as informal elements such as

supervision, data monitoring, and meetings.

Research on collaboration school models has revealed concerns regarding governance details tied to the implementation and administration of two distinct educational systems. Issues such as accountability, autonomy, and transparency emerge prominently resonating with authors concerns as highlighted in Chapter Three (Tilak, 2016; Fiske & Ladd, 2016, 2020; Verger & Moschetti, 2017a, 2017b). Furthermore, participants in the research emphasised the important role assumed by school leadership within the performance management space. The subsequent section delves deeper into these two key themes – the coexistence of two governance systems and the management and leadership's influence and expectations – and establishes their connections with the data gathered from the study.

5.2.1 Two Systems

In the implementation of performance management within collaboration schools, teachers observed the requirement to navigate two distinct and often conflicting systems. As detailed in Chapter Three, multiple authors, such as Tilak (2016), Verger and Moschetti (2017a, 2017b), and Ladd and Fiske (2016), emphasise the importance for governments and states engaging in educational PPPs, as educational reform, to address various known concerns. One pressing concern is the strain posed by the management of two coexisting systems. Collaboration schools in SA, similar to the UK academy schools, establish a dual governance framework involving the WCED and the SOP. While remaining government-funded and adhering to the same regulations and requirements as government schools, collaboration schools operate as self-governing non-profit trusts (Feldman, 2020:12).

Given this dual-system structure, it is evident that both funding bodies (WCED and SOP) assert their authority by prescribing specific operational directives and their access to school data and information when necessary. Adhering to two distinct systems, likened to serving two "gods", was stressed by multiple participants across various situations within the area of performance management. This sentiment was described by participant Yasmin, who used religious metaphors to express the distress she experienced. This portrayal can be conceptualised in the sense that religious doctrines are held as sacred rather than mundane, therefore creating significant limitations within the system due to the belief that non-compliance to these systems was a severe offence.

Yasmin stated:

> *"We are **now basically two gods** here; we are still working and doing everything*
> ***complying to WCED** and we have **the SOP**, which is the school operating partner,*
> *that also has their needs and, you know, **wants that we need to supply** to, and*
> *that could make it more not difficult – but **hectic**. I would say because you need to*
> *comply with two different gods, WCED as it is and then the SOP is also giving*
> *orders and things that they want."* (Yasmin, female, Deputy) [own emphasis]

The quotation implies that Yasmin perceived herself as obligated to adhere to and conform to two distinct systems. The metaphorical comparison of these systems to "gods" stresses her sense of obligation, submission, and fulfilment required by both systems. Yasmin's lack of agency to question or negotiate within these demanding systems is unmistakable. She articulates that, while this does not necessarily render the task more challenging, it certainly amplifies the complexity of following directives from multiple authorities.

The literature review chapter not only underlines perspectives and concerns regarding the challenges of managing dual systems, experienced both at the governmental and school governance levels, but also hints at how the absence of clear policies and procedures trickles down to classroom implementation and teachers' responsibilities. Despite the limited availability of literature discussing teachers' experiences within ambiguous or dual systems, it is evident that this issue is increasingly relevant.

Adding to the confusion is the fact that, while the WCED has well-defined policies and procedures, which are documented and established, the SOP's expectations remain vague, communicated primarily through the hierarchical schooling structure. Research participants articulated internal conflicts arising from the coexistence of a familiar and established WCED process, contrasted with the new requirements outlined by the SOP. Teachers expressed a sense of obligation to adhere to or align with the SOP, considering it as their employing authority.

Zara expressed this succinctly below.

> *"… So, I can say that I feel we are still constrained by policy and procedure,*
> *whereas WCED has set out a lot of policy, a lot of procedures that we do need to*
> *follow. Um, collaboration school comes in with expectations and not so much on*
> *policy and procedure. It's difficult to move away from what is set down on paper,*

and actually follow what, the people who pay your salary at the end of the day and the verbal instructions. So, it's a very thin line." (Zara, female, HOD)

Evident from the research participants, as highlighted in the quotations, is the acute awareness among teachers within collaboration schools of the obligation to navigate two, at times, conflicting systems within the school's operational framework. Negotiating this "thin line" between these dual systems becomes a crucial skill set for them.

It is important to explore the impacts that these dual systems have on how performance management is implemented within the school. A more in-depth look at the data unveils two main underlying aspects within the broader theme of the dual systems. These underlying aspects involve the confusion faced by staff who are required to navigate and conform to two performance managements within the collaboration school, as well as the loss of independence resulting from the burden of juggling two performance management approaches simultaneously. These underlying aspects are elaborated and discussed further below.

5.2.1.1 Confusion Created by Two Systems

A significant challenge, as observed by researchers studying UK PPPs, stems mostly from the inefficiencies and difficulties associated with the simultaneous presence of a dual schooling system within a single school. This situation often leads to complications related to policy understanding, accountability, transparency, and stakeholder involvement (De Koning, 2018:176-177). Fiske and Ladd (2014:2020) further explain the numerous challenges faced by organisations operating two distinct schooling systems simultaneously, each governed by distinct regulations. Given the shared basis with the UK academy model, collaboration schools likely encounter similar concerns. Indeed, the requirement to navigate two performance management systems, coupled with a lack of clarity regarding the role of the SOP, has resulted in confusion surrounding performance appraisals among the teachers at North High collaboration school.

Established in 2019, North High School initially commenced with Grade 8 and limited teaching staff. Subsequently, as students advanced in grades, new teachers were recruited annually. Within collaboration schools, the staff's employment is under the school's SGB, while salaries are funded by the WCED. As evidenced in the literature review, the SOP, holding a prominent role in the SGB, aids in managing WCED funds and the school's governance. Despite being employed by the SGB, and therefore the SOP de facto, there exists a state of uncertainty concerning the function of the non-profit operating partner of the school particularly as the

majority shareholder on the SGB. The ensuing data strongly suggest that such uncertainty detrimentally affects the establishment and administration of an effective performance management system, due to the disconnect between employer and employee understanding.

Jen, one of the participating teachers, acknowledged the presence of donors supporting the school, yet she harboured the belief that the school remunerated the operating partner for their services, which is, in fact, not the case. As Jen explained:

> "*I do know that we, the school, have like a team of donors but I'm not sure who they are. I just know that they give us money. And I think the, the education department also gives us an allowance or a subsidy or something, but I think, according to me also, we don't get money from the operating partner. I heard from a teacher that this school pays the operating partner for their expertise and their resources.*" (Jen, female, teacher)

Numerous teachers noted that, apart from their recruitment interview, they had not encountered or interacted with any representatives from the SOP. Moreover, they were not furnished with an introduction to the role of the SOP, nor did they receive insights into the essence of a collaboration school, the identity of North School's SOP, and the operational protocols, mechanisms, and requirements that guide the school. Many teachers conveyed a general sense of confusion about the nature of collaboration schools.

Amina stated the following,

> "*Ja I knew it was like a collaboration school; it's like between a private sector and government sector, but I never really understood the whole way it works.*" (Amina, female, teacher)

Emily's response further elaborates on this lack of understanding:

> "*I don't have an understanding of the involvement of the SOP.*" (Emily, female, teacher)

As evident, teachers at North High School possess an awareness of the collaborative school model present within the school. However, they lack clarity regarding the SOP's role and the interplay between the involved parties within the school environment including the WCED, SGB and SOP. This uncertainty creates confusion.

The lack of understanding concerning the SOPs' role continued in conversations with both teachers and managerial personnel at North High School. They emphasised the view that a collaboration school should mirror the template of an independent school, particularly concerning performance appraisal. Independent schools in SA operate distinct from local government education departments, avoid adherence to IQMS/QMS systems, and often implement their own performance management frameworks. As Dan the principal of North School relays below:

> "*The challenge for us is we are a collaborative school, right, so we sort of function like an independent school, even though we still have all these responsibilities with the Department ...*" (Dan, male, Principal)

This sentiment is further echoed in the interview with the deputy, who concurred that a collaboration school should not be restricted to remain with the WCED performance management system. They expressed the view that this system does not align with their requirements, and therefore, a separate approach should be devised – a choice currently exclusive to independent schools in SA. Yasmin said:

> "*I think there could be in the collaboration school. We should actually create our own appraisal programme, how we appraise and not use the WCED one because it is not working, score etcetera.*" (Yasmin, female, deputy)

The WCED employs the IQMS/QMS systems, obligating all WCED schools to fulfil the prescribed performance management documentation. Given the delegation of governance, including performance management frameworks, to external service providers in collaboration schools, the lack of clarity regarding whether collaboration schools should adhere to WCED systems or institute their own is understandable. This ambiguity has led to schools attempting to concurrently conform to both systems to ensure compliance, but doing so is burdensome and "heavy" for the teaching and management staff at the school. The principal of North High School, Dan, comments on this below:

> "*The situation where we find ourselves is that the **department wants us to do IQMS** … the (**SOP**) they would and **develop their own instrument** and that was **heavy**, we were still sort of working with **two** kinds of **systems** … I personally think there is still a lot of **compliance from WCED**, so when you sort of **independent**, then you should have a bit of a **leeway** to do your own thing. You understand? But there's still the compliance issues, yes.*" (Dan, male, Principal) [own emphasis]

If the schools' performance management allegiance and structure is unclear, if there's a lack of alignment between employers and employees, and if the leadership does not communicate well with teachers and staff, this can undermine the effectiveness of the performance management process. For performance management systems for teachers to work well, it is important that they clearly understand their responsibilities and who they answer to (Aguinis, 2019; Heystek et al., 2014). The coexistence of two systems generates confusion regarding the choice of the appropriate performance management framework to adopt, thereby introducing uncertainty around the selection of suitable performance appraisal tools, if any. Yasmin, North High School Deputy, confirms this in the quote below:

> "*This year, we still used the IQMS, but then I phoned WCED because they didn't communicate with me who is the coordinator of IQMS. So, they said, 'No, it is not necessary for you guys, you collaboration school, to do this'. So, I left it. That's what I have been told.*" (Yasmin, female, deputy).

Fiske and Ladd's (2020) analysis of challenges observed in UK academies, which are, arguably, relevant to the South African context due to the similar foundation of the collaboration school model, cautioned against instituting dual school operating and governance systems. As evident from the earlier quotes and discussions, when a collaboration school adopts two systems – one where governance is outsourced without clear policies and procedures, such as to the SOP, and the other marked by insufficient communication concerning stakeholders and operational dynamics, this promotes confusion, limited understanding, and uncertainty when trying to implement any form of performance management.

5.2.1.2 Lack of Autonomy within Two Systems

Bureaucratic teacher-performance accountability systems often produce negative outcomes on teachers' sense of autonomy and professional autonomy, sometimes causing them to teach geared for test results rather than developing understanding (Parcerisa et al., 2022:5). Fiske and Ladd (2016, 2020) additionally caution about the challenges associated with PPPs, which might result in a loss of autonomy when subjected to external governance and management structures.

Nurturing teachers, who embrace opportunities for autonomy and assume responsibility for their teaching and learning, is deemed a positive attribute, often indicative of effective teaching (Shalem et al., 2018:210). Nevertheless, fostering autonomy necessitates both environmental conditions influenced by curriculum-related aspects and teacher-specific factors such as

attitude, confidence, knowledge, and experience, culminating in subjective conditions. Teachers require an environment of non-coercive authority that avoids imposing rigid rules, procedures, and responses. Instead, the school's social norms should foster and increase teacher involvement and adjust preferences to facilitate teacher development and growth (Shalem et al., 2018:210).

At North High School, teachers did not sense supportive school customs or the nurturing of autonomy. The requirement to adhere to two systems introduced more confusion and contradiction concerning the desired autonomy. When teachers expressed a desire to approach tasks uniquely, under the assumption that being part of a collaboration school would permit this, they were disappointed to discover that their connection with the WCED systems restrained them from doing so. As Zara states:

> "*I think if teachers took full autonomy for the student teaching and learning and ran the classrooms as they would like to, they would **get into trouble**. This is because the content, when something is taught and the way it should be taught, **has to align with the WCED and the SOP**. And both of those **systems do not speak to each other**. It would be a much better system if the WCED and the collaboration schools could sort out their policy issues and choose one system that the collaboration schools can then follow.*
>
> *Currently, the double system is **causing confusion and conflict** amongst the staff who **are trying to take autonomy** for their own teaching and learning but are not able or allowed to do so. It is **very stressful needing to operate in both systems**.*
>
> *The WCED has their own policies that must be followed, but the SOP have created their own expectation and informal policies which are sometimes in direct conflict with the WCED policies. **We are not managing to meet both the operating partners' systems and the WCED systems which is causing conflict; so the teachers then don't feel like they have the necessary autonomy to make decisions around how best to manage their teaching and learning space.**"*
> (Zara, Female, HOD) [own emphasis]

Having to answer to two conflicting systems, with the confusion and uncertainty this brings, leads to less autonomy (Ladd & Fiske, 2016; Shalem et al., 2018; Parcerisa et al., 2022) as this study also found. Teachers feel that, due to working in a collaboration school, they should have the authority to amend the curriculum, create across departmental projects, decide on when elements of the curriculum should be taught and expand on the way teaching and

learning take place in the school, similar to how a private school in SA may operate.

However, information from the WCED opposed the idea, and this led to further frustration amongst some of the staff as Jen elucidated:

"*Okay. There are some things that I've been able … so we had a subject meeting on Monday, and we are talking about reconstructing the curriculum, because apparently, we are allowed to do so, because we have collaborations sort of private. But as I understand, I think the WCED fund us, so they also have a lot of control over what we do. So, we can't reconstruct the curriculum, but we are supposed to be able to … We have to use the WCED plans. We have to use the revised ATPs.*" Jen, female, teacher.

As noted earlier, North High School's teachers grapple with the complex task of managing two often conflicting systems inherent to collaboration schools. This challenge is difficult. Teachers sought autonomy within a school intended to pioneer SA's new educational reforms, only to find their autonomy hindered by the necessity to navigate two divergent systems and their rules, adding to their burden.

Addressing teachers' viewpoints on performance management's operationalisation within the school, the above explains insights from the first theme – dual systems compliance. This is further detailed through subthemes, highlighting confusion arising from the systems' coexistence and the reduced autonomy under the dual structure. The following section delves into the same sub-question, exploring the emerging leadership theme within collaboration schools.

5.2.2 The Role of Leadership

Effective leadership plays a crucial role in teacher performance management, as adept leaders streamline the process and harness their leadership skills to ensure that teachers' performances positively influence student outcomes (Hartinah et al., 2020). The second emerging theme, examined in the ensuing discussion, originates from the exploration of performance management's operationalisation within the school. This theme deals with the leadership and management's influence on steering performance management within collaboration schools to facilitate seamless processes and impact positively on student results. Management practices are presented through two emergent subthemes: firstly, how school management and leadership oversee teacher contracts to clarify expectations; and secondly,

how school management navigates communication and transparency issues stemming from this new South African education reform context.

5.2.2.1 Leadership and Clear Employment Contracts

As addressed in the literature review, authors, such as Barrera-Osoria (2012) and Heystek et al. (2014), emphasise the necessity for well-defined policies, guidelines, frameworks, and the requisite performance standards and system of measurement before engaging in private-public partnerships. Especially for frontline implementers, these contracts and their standards must be carefully formulated to ensure the successful execution of educational reforms.

Consequently, leaders must ensure that any performance management system contracts, including employment agreements, include expectations for performance standards, working hours, additional student support, and other terms agreed upon by both employee and employer. In the semi-structured interviews at North High School, several teachers expressed concerns regarding contractual matters and uncertainty about employers.

North High School, similar to a few other collaboration schools in the WC, experienced a shift in its SOP. This rapid alteration in governance is unfamiliar to government schools in SA, where belonging to a government institution typically translates to stability and gradual change. North High School, despite its mere three-year existence during the interview phase, initially collaborated with a well-defined operating partner with established methods of governance. Subsequently, the emerging operating partner transitioned to one which was in the process of formulating policies, procedures, and even a definitive organisational name. This state of change caused anxiety among teachers, notably concerning their contracts and their true employers. As Jen mentions below, teachers had to re-sign their employment contracts, an action previously unnecessary for state-funded and employed teachers:

> "... *And I know there were two contracts. So last year's contract is different than this year's because our operating partner apparently changed. So, we were supposed to re-sign because our … the union came to talk to us saying you have to have a signed contract ... all of the teachers who signed last year and before that had to re-sign the contract because there's a new contract.*" (Jen, female, teacher).

Several participant teachers noted similar uncertainties stemming from contractual reiterations, addendums, and renewals. SGB teacher appointments are not uncommon in SA. However,

such renewal of SGB contracts due to new SBG members is not standard practice. Due to several details, such as a change in SOP resulting in mandatory resigning of a new employment contract, the operating partners being present in teacher interviews, the data-driven performance management process instilled by the operating partner, and the operating partner sending representatives to address the teaching staff with regards to HR related matters including teacher development as highlighted in this study – it is not surprising that all teachers spoke of the operating partner as their effective employers, although acknowledging they were SGB employees.

This *de facto* employer dynamic highlights a lack of clarity and shared understanding between teachers as employees and their true employers. Considering that the alteration in the SOP led to a modification in the employment agreement, the shared understanding of a situation, perceived and conveyed as an established reality, indicates the SOP as the de facto employer of the teachers. Despite this, the de jure stance designates collaborative school teachers as employees of the SGB with salary funds directed to the collaboration school account rather than the SOP. However, given the overarching authority of the SOP in school governance and financial matters, the precise account for fund allocation becomes a matter of minor significance.

Furthermore, the re-signing of contracts also included addendums and contextual updates to the contracts to include the expectation of the duties and responsibilities of extra curriculum activities, and the incorporation of additional teaching, tutoring and academic interventions after standard school hours. Emily refers to this as shown below:

> "*Well, I must be honest, I received a letter literally just now from the principal to tell us about extra curriculum activities that I must sign … so it reads about you know the overseeing of counselling, guidance and extra-disciplinary curricular activities for remedial and consolidation. So yes, it is expected, it's called duties and responsibilities of the job, so it's like a job description basically.*" (Emily, female, teacher)

The quoted passages underline the current instability confronting teachers regarding their job roles, task expectations, and employment security. As elaborated in the literature review in Chapter Three, an essential aspect of performance management involves ensuring clarity in job descriptions and clear performance indicators, alongside transparent communication regarding any contract changes, job security, and role alterations (Aguinis, 2019; Heystek et al., 2014). Neglecting this aspect could result in an incorrect implementation of the

performance management system and an inaccurate performance evaluation.

When employees experience a sense of security and foster a coaching-based and trust-oriented relationship with management (Aguinis, 2019:51), they can direct more focus on their development and provide honest assessments. During a conversation with the Principal of North School, he explained that, despite staff being employed and governed by the SGB, their contracts were permanent and, if needed, the WCED would absorb all positions. This awareness can potentially reassure teachers and stimulate improved performance due to the sense of security it brings. However, this information appears unknown to the teachers. Dan added that

> "… no they are not on a yearly … in terms of the service level agreement, right, the posts are allocated on ratio. So, once the posts are on the staff establishment, they are permanent posts. So, should this project come to an end, whatever is on the post establishment, the government will then take over as WCED posts, so we don't have to reapply for our own posts and all of our posts." Dan, male, principal.

The WCED's role in contributing to salaries and providing reassurance of permanent job security is not effectively communicated to the teaching staff. In fact, a contrary belief seems to exist as numerous teachers are awaiting official confirmation of their permanent employment. As highlighted by Jen during her interview, certain teachers have been waiting for as long as three years to receive written acknowledgement of their permanent positions, and such confirmation has not been forthcoming. Regarding the contracts, she noted:

> "*But they also explained to us that* **teaching positions are not permanent**. *It's a year-to-year contract, but they can't just fire you after a year. It's like assumed that your contract goes on that you have to re-sign … I have a six-month probation and then, after that, I become permanent. But, apparently, I'm also supposed to get a letter which says I'm now permanent, which I haven't received yet…. I'm still* **very confused** *and I'm not sure, but I know that the issue today was that there are teachers who have been working for the school for three years and have not received their* **letters of permanency** *yet.*" (Jen, female, teacher)

As demonstrated by Jen's account above, this lack of understanding generates a sense of confusion among the staff. Both recently hired individuals and longer-serving teachers expressed a shared confusion, not fully comprehending their employer, their obligations, and the governance of their employment contracts. Considering this ambiguity, a viable

performance management system cannot be effectively implemented. As explained in the literature review in Chapter Three, a primary step in organising a successful performance management system involves ensuring accurate job descriptions, sufficient performance indicators, and a clear understanding of contractual agreements (Aguinis, 2019; Heystek et al., 2014). However, this process is evolving and incomplete at North High School.

When analysing how North High School, as a collaboration school, operationalises performance management, there is a logical progression to examining how contracts are required. Drawing insights from the teacher interviews conducted at North High School, the above findings strongly indicate a lack of contractual clarity and mutual comprehension between employer and employee. Furthermore, research participants voiced concerns about leadership and management, particularly in terms of communication and transparency at North High School. These concerns are explored further through the subsequent presentation of data.

5.2.2.2 Leadership Communication and Transparency

A fundamental responsibility of leadership is to facilitate planning and effective communication between management structures and those tasked with implementation (Hartinah et al., 2020; Aguinis, 2019). In the context of implementing performance management systems, such communication and preparatory measures are necessary to support the process. However, throughout the study, North High School's teachers conveyed that communication from the management team frequently generated feelings of underappreciation and mistrust among the staff. Zara reiterated this general lack of communication during her semi-structured interview:

> "*There is a lack of communication that comes for the top down where several things are lost in translation, which often leads to the staff feeling a lack of trust and unappreciated.*" (Zara, female, HOD)

Jen's views on management communication align with Zara's and are shown below. Jen adds that the lack of communication also leads to staff confusion and frustration:

> "*The teachers talk about the management team … I think there's a lot of frustration because communication is not always there … So, there are two people who mostly make decisions about like our admin and due dates and stuff, and sometimes they don't say the same thing … and then it becomes very confusing for us.*" (Jen, female, teacher)

As illustrated above, teachers at North High School experienced a complex interplay of confusion, frustration, and a sense of underappreciation attributed to communication breakdowns between the staff and management. There existed a perceived disconnect between the requests and expectations expressed by school leaders and what teachers comprehend and convey. Furthermore, conflicts within the management team not only highlighted problems with top-down communication but also created difficulties in communicating effectively among team members at the same level.

These communication concerns became pronounced when teachers responded to questions regarding the communication of performance management aspects during research study interviews. Teachers expressed disappointment in learning about their performance review schedules through messages relayed by students or casual exchanges with colleagues. They conveyed their perceptions of mismanagement stemming from communication issues, evoking frustration, anxiety, and concerns about the system's value and efficacy. Emily refers to the anxiety that the lack of information and communication caused her in her response below:

> "*I think my disappointment with regards to that was the fact that I found out kind of by the way ... I was like okay, I don't, I didn't know that that was happening. So, I was a little bit disappointed by that. I would have liked to be told 'okay this is going to happen; this is why it's going to happen'. Ja information is fantastic. So, I had a lot of anxiety about that as well.*" (Emily, female, teacher)

Jen's response to inquiries about the communication of the performance management and review process further emphasised the weakness in communication and her state of confusion. Additionally, she expressed anxiety about the assessment criteria and the subsequent implications of the assessment outcomes:

> "*I don't know exactly how they are planning to review us. What exactly is going to happen or even, like you asked, like what would happen to a teacher if their classes are just not improving like I don't know. And I don't know how they would even quantify our performance in class. So, I think maybe the absence thereof and it's not, it's not communicated very clearly.*" (Jen, female, teacher)

Even Zara, who held the position of department head, perceived gaps in the communication regarding performance management aspects. She specifically noted that the process lacked a developmental focus, highlighting a significant shortfall:

"*It is it's not as I expected it to be. So, I do feel that there are some gaps that we could fill up as a management team when it comes to performance reviews as well so that it does not become a once-off process and it becomes slightly more developmental.*" (Zara, female, HOD)

Emily elaborated on this stating that the intention of the performance management is lost. For Emily, the disorganisation from management during the process of performance management was in complete opposition to her way of being which caused her great frustration:

"*So, I think, the biggest thing, my biggest gripe at this moment is the fact that I feel like I'm missing a piece of puzzle but I get told things last minute, It's very frustrating because I don't operate like that I am actually a very organised person … but a person needs time to do that properly, you can't just rush things and then expect them to be an accurate reflection … I think the actual purpose or the intention of this process is completely lost. It's lost on us, I think new teachers, but even on those who have been there for a while. I think it's lost on them. They don't recognise the value that it could add if it was done and managed properly.*" (Emily, female, teacher)

The primary purpose of performance management is to improve communication about organisations and employee performance to foster a shared understanding of the goals, purpose, direction, and challenges of the organisation (Mercer et al., 2010:145). The absence of communication between school leaders and teaching staff, particularly regarding the performance management system, along with breakdowns during the performance review process, highlights concerns over transparency.

Transparency and trust are inherently rooted in sound communication mechanisms, whether verbal, written, or visual (Mercer et al., 2010; Heystek et al., 2014; Aguinis, 2019). Several research participants highlighted instances of transparency deficits within various contexts at North High School. The research findings point out transparency as an issue not only affecting the performance management process but also influencing other dimensions of school leadership.

Emily mentioned strongly, in the quote below, her impressions of the performance management system at the school, similar to the poor management communication, and planning and then mentions concern about transparency:

"*Personally, I think it's **very poorly managed.** I think that you must also be fully informed like the teachers are **not properly informed.** I think things would go a lot better if there was information readily available when given to teachers **timeously** and I think timeously, I would like to highlight because, as you have seen, now literally what my day looks like … I don't know, I honestly don't know. I think, I almost feel like there's definitely a piece of the puzzle that a lot of us teachers are not aware of, or that we're just plain missing. We don't know where the stuff goes. There's **no transparency** in terms of the process.*" (Emily, female, teacher) [own emphasis]

As shown in the literature review, planning the performance management process timeously and communicating this to all parties is essential (Heystek et al., 2014). Emily's response reflects a sense of frustration among the teaching staff at North High School stemming from communication breakdowns, last-minute developments, and a lack of proactive planning. Many of the teachers expressed similar dissatisfaction with the lack of planning and the last-minute nature of the performance management review process.

The pervasive lack of transparency within the performance management process extended to various areas of management, leadership, governance, and staffing, as indicated by research participants. The data gathered from participants' responses revealed that this lack of transparency had been ingrained by previous SOPs and entrenched within the school's governance and systems. Zara, a head of the department tasked with balancing her role as a middle manager aligning with the broader teaching staff while being part of the management team, highlighted the necessity of addressing transparency issues within the school from multiple perspectives:

"*We all need to look at the parts we play. One thing that could help would be to **have more transparency** and direction in the school. The **previous SOP had very little transparency**. We did have a meeting with them to try and address this lack of transparency and find out what is their vision for the school, as well as what resources are available and what the financial situation is – however these meetings were fruitless. They seemed to come from a direction of 'you work for us, so don't question us'.*" (Zara, female, HOD)

Zara's insights offer valuable perspectives on the influence of the previous SOP's leadership at the school. Her observations also stress the need for transparency and communication to extend beyond just staff management. The concern around transparency resonates with the

literature review, where PPP schools were excluded from discussions surrounding partnership governance policy and implementation (Fiske & Ladd, 2016, 2020; De Koning, 2018). The excerpt above posits that the lack of transparency was ingrained within the governance structures established by the previous SOP and, even though this issue was addressed, the school still faces the same transparency challenges under the current SOP.

It was further relayed that this method of screened knowledge persists within the school system under the current SOP. Pete, a teacher at North High School and a representative on the SGB, shared that all members of the SGB need to sign a non-disclosure agreement (NDA) that prohibits them from sharing information discussed in the SGB meeting:

> "*No, we strictly have an NDA with the school. If you're part of the SGB, you don't actually say anything to any of the teachers. What the principal does is he sends out a memo of what was discussed to the teachers. So, everything that is applicable to the teachers and then I act as sort of a confirmation to the teachers that that is what was discussed in the SOP, in the SGB meetings.*" (Pete, male, teacher)

Maintaining privacy around SGB meeting content is a common practice yet, in the context of a collaboration school, this approach creates a direct barrier between de facto employers and employees. This situation arises because the SGB comprises 50% representation from the SOP, who holds responsibilities for both recruitment and school governance. Despite the SOP's authority over school decisions, there is a deliberate disengagement from frontline implementers, ultimately serving to shield the SOP from potential conflicts and crises.

The principal of the school acknowledged this. He shared the perspective that the SOP intentionally maintains a distance from the staff at North High School, positioning the principal as the intermediary to address teacher concerns and ensuring proper channels are followed, he stated below:

> "*The SOP they would want it to work through the principal, so because they would not want the teachers to communicate directly with them. They push, if you have problems, speak to the principal. The principal will take it up with the various stakeholders.*" (Dan, male, principal)

Curiously, the strategy of introducing barriers to prevent direct interactions between the SOPs, who hold the roles of de facto employers and governance authorities at North High School,

has not been connected to the teachers' demands for transparency and communication. This is despite Zara's earlier claim that teachers and staff explicitly requested meetings to address this very issue, which ultimately produced unproductive outcomes. The principal of North High School feels that communication and transparency are not a concern and are simply mistakes:

> "*There are normal management issues that people have; they should feel we should communicate more or we should whatever. Or they weren't consulted or all of those kinds of things, but I mean those are … I push transparency. I don't hide anything and, if I omitted to communicate something, then it is just an error or ignorant or something but it's not that I deliberately try to exclude them.*" (Dan, male, principal)

Jen aligns with Zara's viewpoint, highlighting that transparency and conflict solutions have not been effectively addressed within the school. Despite the principal's advocacy for communication and transparency, this sentiment does not resonate with the staff. Critical matters, such as pay disputes and contract negotiations, which typically involve discussion between an employee and their employer, become barriers, as teachers are instructed to exclusively communicate with the principal rather than their actual employer – the members of the SGB and therefore the SOP. As Jen states below:

> "*… teachers found out that all of the teachers don't get the same salary, which is something I didn't know about, but the school advertised the position with a certain salary and apparently some teachers are not getting that salary and they want to dispute it at the meeting. And the principal did not handle it well. He said, 'if you have issues with your salary, you can speak to me personally, but you signed a contract and you were happy with that.' … Yah. And things like … the things that the teachers have brought up to address at the meetings, they've not been handled very well.*" (Jen, female, teacher)

While it may be comprehensible that the SOP would prefer staff governance matters to be handled by the principal rather than themselves, this approach places additional burdens on the frontline staff who are tasked with implementing the new educational reform. Furthermore, this strategy allows the SOP to sidestep engaging with conflicts. The heightened pressure and the assumption of extra conflict management responsibilities by the SMT can divert its focus from effectively supporting teachers. This deficiency in support hampers the SMT's ability to guide teachers through the performance review process. Emily stated this in her response to queries on the support in the performance management process:

"I was very disappointed. I was disappointed by how things were managed. I was disappointed by the leadership in terms of guidance and advice and support … The support is non-existent. There is no feedback, there is no guidance in case of, you know, you're running, and you're function at whatever capacity you can, there's no time to take the wheels off and change the puncture." (Emily, female, teacher)

Jen summed up the basic communication and transparency issues as it seems that there is no deliberate attempt to cause conflict or miscommunication but these matters, when they arise, are not being dealt with so that they can be avoided in future. She maintained:

"Sometimes the way the things are communicated can cause friction … Just, I think, from the management side, sometimes, I think things can be handled a bit better." (Jen, female, teacher)

As outlined in the literature review, Aguinis (2019:51) emphasises the pivotal role leaders play in effectively implementing performance management systems. He points out the importance of feedback, the ongoing nature of the system, meticulous planning, fostering relationships, ensuring clarity, and maintaining effective communication. As evident from the preceding discussion, several of these aspects are not ideal and have raised concerns among the teachers at North High School.

5.2.3 Sub-Question 1 Summary

Leadership plays a crucial role in enhancing teacher performance and ensuring the smooth operation of performance management processes (Hartinah et al., 2020:236). Considering that North High School is a new school striving to implement a new education reform in SA, plus that it has recently undergone a change in its outsourced management and governance structure, addressing the concerns raised by teachers about the implementation, operation, and administration of performance management becomes essential. These concerns include issues stemming from the confusion arising from conflicting systems, autonomy, communication, contracts, clarity, transparency, and procedural aspects. To truly motivate and develop its teachers, the school management must actively address these challenges.

5.3 Teachers' Perceptions on the Effects of Performance Management at the School

This section addresses research sub-question 2, examining teachers' perceptions of the

impact of performance management on them. While the primary goal of teacher performance management is to enhance student results, establishing a direct link between performance management and improved learner outcomes is challenging due to the complexities of education and the difficulty in demonstrating a clear correlation between teacher classroom practice and better results (Mercer et al., 2010:146).

Performance management has been associated with various effects, both positive (motivation) and negative (stress and anxiety). Given the correlation between teacher motivation and increased student learning outcomes, this becomes a pivotal concern for school governance (Neves de Jesus & Lens, 2005). Conversely, teacher stress and anxiety, often tied to workload and emotional labour, can lead to decreased performance and lower student results (Asaloei et al., 2020; Wang et al., 2019).

In the earlier discussion of the sub-question, it was explained that the school employs a data-driven performance management system for evaluating teachers. This system relies on comprehensive data collection, analysis, and utilisation to assess teachers' strengths and weaknesses, with a focus on student performance and outcomes.

The performance management system at North High School initiates a range of consequences and shapes teachers' perceptions in multiple ways. Drawing from the collected data for this study, the implementation, management, explanation, and administration of the performance management system have led to five main perceived effects on teachers. These effects on teachers can be grouped into two main categories. The first encompasses personal impacts on teachers, including anxiety and stress, reduced motivation, increased administrative load, and extended working hours. The second grouping encompasses effects that are more relational and objective, influencing teachers' environment, relationships, and practices rather than just themselves (e.g., a narrowed focus on learning, reflection, and sharing).

These effects are further explored through the teacher interview data presented below.

5.3.1 Individual Effects

The three effects below show how performance management impacts and affects teachers at North High School on a personal, subjective, and individual level.

5.3.1.1 Effect One: Anxiety and Stress

If stress is limited and professionally managed, it can result in productivity; however, being over stressed negatively impacts teachers' well-being as shown in the literature review (Holmes, 2019:13). Teaching lends itself to emotional labour and, as Keller et al. (2014:1) state, teachers report having to use emotional labour tactics in as much as a third of their classes. The fact that teachers need to constantly ensure that students do not see or sense their true frustrations creates additional stress and anxiety (Burić, 2019:17).

Within the context of performance management, teachers at North High School are required to implement interventions and improvements in students' academic performance in striving to increase marks and grades compared to previous terms and years. The responsibility to improve student outcomes places substantial pressure on teachers from the beginning of the academic year. As Jen shows below, this starts at the first staff meeting of the year:

> "*In the beginning of the year, our first staff meeting, they put up all of the data of the last year. So, every subject and then the term one and the term two and the term three and the term four, class averages or grade averages, and then they had like a talk with us about how we are going to improve this. So, I think that's like the combination of all of the teachers' improvement plans over the year … I'm not sure where it goes beyond, from beyond the teaching staff. I'm guessing that whatever we say will be pitched to the SGB.*" (Jen, female, teacher)

Teachers often find themselves grappling with learning gaps in students' knowledge that originate from previous years and educators. Jen highlighted how discussions about the previous year's results primarily revolved around the obligation to improve performance, with the subsequent grade's teacher bearing the responsibility of achieving better outcomes than the previous year. Increasing the anxiety triggered by this pressure, Jen assumed that the discussions and presentations in these meetings would be conveyed to the SGB. This potential exposure of performance-related discussions to the SGB added to the stress teachers experienced regarding the need to perform well and achieve superior results.

In the interview with Amina, her anxiety surrounding the necessity to improve student outcomes and her performance became severe. She expressed feeling overwhelmed and uncertain, which led her to tears during the interview. Despite her positive sentiments about the school environment and the supportive staff, the directive to increase students' marks left her feeling unsupported. This intense focus on achieving higher marks exacerbated her stress and

anxiety, as depicted below:

> "*Ja, definitely, made it more but also **made it more difficult** because now you are in a space where you wonder: 'am I actually getting this thing across?' And say if I don't get, say for instance, I don't get the time to do the intervention … The time there is never enough time; we have like half an hour-long lesson and then, I am going to be honest, our kids are not as actively engaged with their work, and it is very sad because you can stand there and explain yourself silly and then it goes nowhere. So yes, it is actually, I want to **get emotional** when I think about it … **I put in a lot of effort, like a lot, and I have been neglecting personal matters** because I am attending to kids and then nothing. So that is, it's very disappointing … because **the last couple of weeks I have been sacrificing so much**.*" (Amina, female, teacher) [own emphasis]

Amina honestly discussed how her anxiety surrounding the demand to perform and show improvements in her results, along with the requirement to submit extensive data, had led her to neglect personal matters and make significant sacrifices to meet the school's demands and fulfil her job responsibilities. She acknowledged the time constraints and increased challenges posed by the additional data tasks. Particularly concerning was the need for more time to complete these tasks and to engage in additional interventions aimed at enhancing weaker students' marks.

However, Amina's experience of stress and emotional turmoil, as revealed during her interview, must be set aside while at work to conform to the teacher occupation's expectations of professionalism. In the teaching domain, openly displaying intense emotions rooted in personal frustration and distress is not typically accepted. Amina must manage these emotions as she interacts with students and presents a public-facing self that aligns with the requirements of her position, both stated and unstated. Consequently, the anxiety and stress stemming from her evaluation as a teacher, based on student results, contributed to her emotional labour. This form of emotional regulation has been linked to heightened stress and its contribution to teacher burnout, exhaustion, and reduced motivation. This aspect is discussed in the literature review chapter, accentuating the connection between the need for emotional regulation techniques and increased anxiety (Lee, 2019; Wang et al., 2019). Emily also shared her sentiments of frustration and emotional responses related to the performance management system at the school:

> "*I know I'm not really, I'm not really emotional, overly emotional, but it left me feeling*

very, very frustrated. I was exceptionally frustrated. I felt very lonely and I felt like 'geez guys, ma'am, how do' … No wonder new teachers don't stay or don't … no wonder new teachers don't stick it out or any teacher for that matter … It doesn't have any value to me right now. It hasn't added any value so far to my stay."
(Emily, female, teacher)

Emily's statement is powerful. It shows the magnitude of her anxiety and frustration, raising concerns about the capability of new teachers to endure the emotional turmoil and isolation produced by the performance management process. She deemed the process worthless, echoing the sentiment expressed by various teachers, including herself, who grappled with emotional distress while feeling disconnected from the process. The literature review highlights the attrition rate among novice teachers, attributed to the emotionally taxing nature of the profession (Schultz & Lee, 2019:179). The pressure for performance driven by data worsens internal conflicts, influencing teacher identity, agency, and voice (Singh, 2018; Gray & Seiki, 2020).

Emily's concern for new teachers at North High School is not isolated as the school prefers hiring recently qualified teachers. Amina, a novice teacher, voiced her anxiety tied to her newness and the demands of data analysis expected to validate her teaching performance:

"*I am new to the data analysis and so that is also one of the things that's causing anxiety for me. Because it's like you sometimes don't even really know where to start, like where you must start.*" (Amina, female, teacher)

The data analysis, student results, and performance management at North High School imposed significant stress and anxiety on the teachers. While the teachers were aware of its utilisation to identify weak instructors, the evaluation process lacked a tangible sense of development and value. The deputy principal, a member of the school management team, agreed that data analysis was used to identify teaching weaknesses and sections of the curriculum that teachers struggled to implement, and reflected on teaching practices. This concerted effort seeks to enhance teachers' performance and consequently improve student outcomes. As Yasmin noted:

"*The data analysis for me should be you look at your learners are not performing in a certain subject but they are performing in others then you can then say what is the teacher doing wrong? You know where is it going wrong … However, if those learners that can perform in my subject is not performing in the other teacher's*

*subject, or vice versa, then you have a problem, what you doing wrong, **what am I doing wrong and where am I teaching wrong**.*" (Yasmin, female, Deputy) [own emphasis]

The deputy principal demonstrated that teachers at North High School undergo data monitoring and student results analysis to identify areas of weakness or errors in their teaching. As Sullivan et al. (2021) and Singh's (2018) research show, this obsession with data analysis is driven by a need to fix the teacher problem and erodes teacher confidence and undermines trust.

The focus on the student's poor results and teacher performance is processed through data analysis and utilised as a mechanism to bring to the attention teachers' areas of development. However, as shown above, no other aspects are taken into consideration. This lack of inclusion and single-minded focus is a concern for teachers and causes fear and anxiety for the data analysis and the teacher's performance management system within the school and, as Power and Parkes (2019:3) show, erodes teacher sense of agency particularly around how and what is a quality teacher.

Fear and anxiety are emotions teachers must regulate within their classrooms and professional environments. Those, like Emily and Zara, who grapple with these emotions, must invest energy in emotional management (Burić, 2019:17). Anxiety, frustration, and fear correlate strongly with burnout and job dissatisfaction (Lynch & Klima, 2020:162).

Emily also conveyed how the data analysis and performance management aspects placed pressure on her, to the point of feeling overwhelmed, reinforcing the connection to stress and anxiety:

"*There was such a massive amount of pressure for this data analysis and I tried to do it on my own and then, on Sunday, I sent a message, an email, after I was like **at my wit's end, and I said listen, please, I need help.** I need some training. This doesn't make sense …*" Emily, female, teacher [own emphasis]

As discussed, stress arising from performance management permeates various levels at North High School. Significant anxiety stems from the utilisation of student results as the primary gauge of teacher success within the implemented performance management system. While concealing these emotions, presenting a composed front, and persisting in their roles is anticipated, one must consider the toll it exacts. Burić (2019) and others illustrate the

detrimental effects of feigned emotions on teacher well-being. This anxiety, stress, and frustration are concealed from both students and colleagues, as teachers put on a brave front, endure sacrifices, and persist in their duties. As Sullivan et al. (2021) highlight, an inadvertent outcome of performativity and data-driven approaches is heightened anxiety and pressure. The performance management system's focus on performativity and North High School's fixation on student outcomes not only triggers emotional labour, stress, and anxiety but also influences teachers' personal motivation levels, as elaborated below.

5.3.1.2 Effect Two: Demotivation

Motivation propels us to overcome challenges, energising and guiding our actions, and forming the foundation for perseverance in an ever-changing environment. It is not a "quick fix" but an enduring cultural response to change (Heystek et al., 2014:79). Given its direct impact on student outcomes, teacher motivation is a vital focus for school leaders (Neves de Jesus & Lens, 2005). While various factors influence teacher motivation, Singh and Rana (2014) emphasise that performance-related motivation must adhere to principles of transparency, reliability, validity, and trustworthiness to yield positive effects.

North High School's emphasis on student results as a metric for teacher success understandably affected teacher motivation in response to students' performance. However, situated in an underprivileged South African community (refer to Chapter Two for context), many students grapple with educational challenges rooted in a historical context rather than just classroom teaching and learning. Students from disadvantaged backgrounds often exhibit a negative mindset, intensifying barriers to learning. Neglecting teachers' calls for change, social justice, and their passion for education erodes teacher agency (Power & Parkes, 2019). North High School's narrow focus on academic marks, without addressing the broader challenges or fostering mindset shifts in students, leaves teachers *"demoralised"* and "*bummed out*", as Jen describes below:

> "*The term two marks are always lower than the term one marks; it bummed me out a lot. Like I felt, shoh, their class average went down and, but I think the teacher always doubts in themselves, like what did I do wrong?*" (Jen, female, teacher)

Here Jen expressed that teachers' focus on the marks, and how they seem to decline despite their efforts, demotivated the teacher. Furthermore, as the school focuses on the student results and where teachers are "weak", this leads to teachers blaming themselves for the student performance or lack thereof, even if they were not to blame. Pete expressed a similar

sense of demotivation:

> "*So, I think that's the, the indifference that some of the students have towards their education is probably the most demoralising thing about it. Sjoe, they couldn't care. You're saying to them, you're getting 2% in maths in term 1 and 2 and then you're like, you know, you are going to fail. And they say, 'no sir, I have to go to the next grade, I've been here for 2 years'.*" (Pete, male, teacher)

Pete referred to another concern around the focus on student results, in that, even if students are performing badly, the national education department will only allow a student to retain a space in the current grade band (of three years per band) for a maximum of two years. Pete conveyed that the most demoralising aspect for him was the students' apathy towards their education, regardless of his teaching efforts. These challenges and the lack of motivation among teaching staff are known and noted by the school management team. As shown below:

> "*You can, there are a lot of things that you can do in Primary School already … we first had to break down all those bad habits. It's the unlearning that takes forever. And it is also sometimes soul destroying.*" (Dan, male, Principal)

Dan, the principal of North High School, acknowledged that addressing the historical challenges that students bring to the school environment is a time-consuming and emotionally taxing process. This demonstrates his understanding of the difficulties teachers encounter while educating learners from disadvantaged communities. However, the performance management system in place does not consider these challenges.

Yasmin, the deputy of the school, also mentioned her concern about teacher motivation:

> "*I am really worried about the motivation levels of our teachers as well. I don't know if they feel that freedom to actually speak up and say, but the work ethic you can see that they are being demotivated … Ja, we need people to come in and just do that motivation speech just a bit now. Give them that little motivation.*" (Yasmin, female, deputy)

Yasmin expressed her apprehension about the teachers' level of motivation, which she had observed through their work ethic. As indicated in the literature review, motivation and performance (work ethic) are closely intertwined (Tseke, 2010:20). Yasmin also raised a troubling concern that teachers might not feel comfortable enough to openly discuss their

motivation issues within their work environment. She suggested that the school should take proactive steps to encourage teachers' motivation. This highlights that the current approach of the school, despite being aware of motivation concerns, is not effectively addressing them, as Zara confirmed:

"*There hasn't really been much training on, you know, a lot of, no real focus on teacher improvement and how to get teacher out of the slump that they are in.*" (Zara, female, teacher)

The quotes above show that teachers are lacking motivation as an outcome of the focus on student results and that, although the school management team is aware of the motivation concerns, not much has been implemented or changed to address these. Zara mentioned that it is demotivating when all effort, additional time and teaching do not yield any results:

"*I would say, there are times when confidence and motivation definitely takes a knock. Personally, I know that I do put quite a bit of effort into classes into finding, you know, resources that is appropriate for their learning levels and trying to extend them and make little learning packs. I've got after school classes. But it doesn't really show in my learner results. So, there are times when my confidence does take a knock.*" (Zara, female, HOD)

Zara communicated how the lack of return on investment of teachers' efforts to increase student marks "knocked her confidence" and resulted in her demotivation, as expressed by most of the teachers interviewed. Zara added that the after-school classes are compulsory and part of the data-driven operationalisation of the performance management system utilised by the school. Implementing additional tasks and placing pressure on teachers to increase results at all costs are not yielding the promised impact, and ultimately demotivated teachers.

The section above has shown how the effects of performance management married with the additional stress factors and emotional labour expelled in North High School, have had adverse effects on teachers' motivation. The following section discusses another impact of performance management at North High School, specifically, the increase in administrative tasks and paperwork.

5.3.1.3 Effect Three: Extended Workload and Administration

The literature review highlights the time demands that performance management requires on

both implementers and participants (Mercer et al., 2010; Heystek et al., 2014). Often, schools fail to allocate sufficient time for staff to fully engage with and derive value from performance management. This leads to burdensome processes, work duplication, inadequate time allocation, and teachers resorting to using their personal time to manage the administrative burden imposed by the system. Consequently, the potential benefits of the system are negated. Amina described this time problem:

> "*To be honest, the whole thing is just too time-consuming. I explained to you earlier in this discussion and you plan a thing, and a person comes and then you have another discussion and write up the report. You have to do your own one, so to be honest, I don't know.*" (Amina, female, teacher)

Emily concurred that the process and administrative burden was too time-consuming and added to the teacher workload:

> "*… All the administrative nonsense, it's stressful because it's time-consuming that we don't have and it's stressful.*" (Emily, female, teacher)

Emily not only addressed the administrative tasks that led to time constraints but also highlighted her lack of assistance when seeking clarification about the process. Despite her time constraints, she was directed to speed up the process rather than receiving the support she sought to improve her understanding. Consequently, her queries remained unanswered, intensifying her confusion, as she elaborated below:

> "*So, there's absolutely no understanding of what is going in here. And I think that's what troubles me quite deeply. It really does bother me, like I don't understand the process and next year, when I do this, or next term, I don't know when I do this again. So, ja, and I mean, it was because time was limited.*" (Emily, female, teacher)

Confusion exacerbates time constraints. If teachers understood the process and system implementation, they could navigate it more swiftly. Moreover, understanding the value of the performance management system would raise positive teacher feelings and drive the commitment to thorough completion, as Amina maintained:

> "*So, it is even more time-consuming; people are too confused … which also is very emotionally draining and strenuous on educators because it's about this whole*

thing that I need to do but I don't even know why I am doing it but what is the end
goal of this?" (Amina, female, teacher)

Amina revealed that the confusion surrounding the performance management process intensified time pressures and teacher stress. Moreover, the absence of clarity hindered understanding in the rationale and worth of the performance management system at North High School. In her role as department head, Zara aspired to spread a more developmental approach with teachers at North High School. However, the challenges of time limitations, additional administrative tasks, and responsibilities impeded her efforts, as she described:

"*We also don't have enough hands on deck when it comes to, to helping the*
teachers develop. Just personally, I have spoken to the principal about the
possibility of me sitting in a little bit more in the teachers' classrooms, because we
have so many teachers that are new to the education process, you need those,
you know that, that hand, hands on guidance, and just, you know, just a little nudge,
maybe direction … Unfortunately, it's with time constraints, it's not something that
we could actually do. I have a full schedule … I look at data and everything else.
So, I think that's kind of thrown a spanner into the works. And it's the same with
the principal and deputy principal – its time constraints." (Zara, female, HOD)

Zara highlighted that her frustration with the time constraints of teacher performance management was shared with other school management team members. As explained in the quotes, the performance management system at North High School imposes an additional burden on teachers' already demanding schedules.

The school fails to allocate extra time for the performance management process, requiring teachers to complete additional tasks on their own time, worsening their workload. Confusion surrounding the process and its rationale compounds the time constraints, leading to heightened teacher frustration and workload pressures. Despite discussions within the school management team about enhancing the developmental aspect of teacher performance management through increased time allocation, the management's own time constraints, extended administrative duties, and workload prevents such measures.

Performance management increases teachers' workload, not just due to administrative demands, but also by requiring additional tasks. Numerous quotes above illustrate that the performance management system requires teachers to outline interventions aimed at addressing poor student outcomes and academic shortcomings. Many interventions, often

involving after-school extra lessons or revision classes, proved ineffective at North High School. The lack of student engagement undermines the apparent value of these interventions, impacting teachers' motivation. These mandatory interventions arise from the data-driven processes, linking student marks to teacher performance and required interventions. Emily details below how teachers must demonstrate remedial efforts for students with low results, an aspect of her performance management process:

> "*I've had to give our intervention letters, so I had to give them the letters, the learners the letters to say, okay, this is the date, this is the time of my intervention strategy … I literally only had one student rock up … I have got to prove that I'm trying remedial assistance.*" (Emily, female, teacher)

Emily's distress was visible as she shared this insight. Her anxiety regarding the supplementary work and administrative tasks required for her performance management process, which she perceived as unproductive, was unmistakable. This process requires schools to supply concrete evidence of student learning, accomplishments, and teacher interventions for students with poor results. The limitations that prevent teachers from showing their professional judgment in tangible manners further undermine the trust between society and teachers, leading to a decline in teacher confidence (Daliri-Ngametua et al., 2022).

Zara, the HOD of the school confirmed that teachers were feeling disheartened by the lack of success from interventions implemented by the teachers, however they were still required to do the additional lessons:

> "*We know you've got really good teachers in place, you know what it is that they're doing, they employing the strategies they have after school classes, but they're not really seeing a big change in the learner results. That becomes quite disheartening as well*". (Zara, female, HOD)

As evident above, teachers are required to show interventions and remedial efforts for underperforming students, and this data is integrated into the teacher's performance evaluation. However, these interventions are perceived as ineffective supplementary systems and tasks that increase the teachers' existing workload. This further blocks teachers who are simply attempting to reach the performance measurement standards imposed by the school. This aligns with the research of Perryman and Calvert (2020), which explores how the nature of the workload, linked to notions of performativity and performance management, dulled teacher passions, and impacted teachers' reasons for leaving the teaching profession.

Emily and Amina further expressed that, not only does the intervention process stemming from the data analysis result in an extended workload caused by the additional classes and teaching time, but the additional admin that is required when implementing the extended teaching, also adds to the teachers' already oversubscribed time and tasks, resulting in fear in Amina's case:

> "*… whatever class, they need intervention, but it's difficult to do the intervention with so much to already do – so it is also one of the things that are scaring me.*" (Amina, female, teacher)

As shown above, the performance management system intensifies the labour and admin needed from teachers by demanding that teachers incorporate a failing intervention system which largely demands additional teaching time, administration, and further data analysis from teachers on top of their already full working load. The effect of an extended workload due to the intervention based on the performance management system on teachers working at North High School, on a personal level, is shown above.

The next section shows the effect of performance management on teachers from a relational and objective stance.

5.3.2 Relational Effects

The subsequent effects are categorized based on their objective impact on teachers, including their relationships with others, their environment, and the implications for their teaching and learning practices.

5.3.2.1 Effect Four: Narrow Focus on Student Result Earning

One effect of teacher performance management, particularly in the context of data analysis and data-informed teaching at North High School, is the narrowing focus on learning. The school strongly fixates on student results, with teachers, students, management, and the governing body all emphasising that student outcomes serve as the key measure of the school's success, particularly that of its teachers. The literature review introduces the term "neoliberalism" within the performativity framework, where market-related performance factors are applied to social systems like education. Neoliberal reformers approach assessment without context, overlooking students' backgrounds, demographics, and culture. They lack consideration for connection, community, advocacy, or social change, focusing purely on numbers, accountability, and their version of quality. This privileging of student results

approach erodes teacher agency, reducing teachers and students to mere statistics (Daliri-Ngametua & Hardy, 2022; Power & Parkes, 2019).

During the interviews, several teachers expressed their thoughts on the desire not to have the student's marks as the sole focus and measure of teacher performance advocating for the consideration of other factors when evaluating staff at North High School. The process relies on data-driven assessment to gauge both student and teacher performance.

Amina explains her understanding of what the data-driven decision-making process and data analysis are part of the teacher performance management system at North High, and its preoccupation with student results:

> "*So, the data analysis is where we track not track but we basically use any classes'*
> *marks, compare it the terms, compare the graphs on Excel with the marks we put*
> *the kids in a high, low and middle order and then we say what our intervention*
> *plans are but we have to do it per class.*" (Amina, female, teacher)

As Amina explained, the school used data based on student and class results to compare student marks on a termly and annual basis, seeking improvements in both student and teacher performance. Consequently, teacher performance was solely dependent on the performance of another individual, namely the student. In cases where students do not exhibit improved performance, therefore reflecting weakness in the teacher's performance, teachers are required to outline interventions to address this deficiency and then show how they are actively working to improve the students' marks.

The principal of North High School confirmed this approach, affirming the use of data to find teachers' performance weaknesses through students' results and data, as indicated in his statement below:

> "*… from that **data you can identify your weaknesses** and also you need to do*
> *an item analysis of your work as well, because, in some sections, the teacher might*
> *be very strong whereas in others, they may be weak or they might not be as strong.*
> *So, some parts of the curriculum they can deliver well other parts they cannot.*"
> (Dan, male, Principal) [own emphasis]

As can be seen from the quotes above, especially from the principal, data are being used to note where teachers are weak and where their performance, based on the student marks, is

lacking. From this analysis, the teacher will implement interventions to address weaknesses. Emily and Zara described how they were being appraised and their performance and analysis being rated solely based on students' marks:

> "***Teaching is considered successful*** *mostly on the* ***learners' results****. Actually, it's a fear of mine, the* ***learner's performance is it's a collaborative thing****. They need to be just as invested as what you are and it doesn't matter how invested you are in, it's a team thing, it's a team effort. So, if they don't come to school or if they bunk or if they don't do their homework or whatever it's problematic.*" (Emily, female, teacher) [own emphasis]

> "*I think it is quite stressful, especially for the teacher, because the* ***students' performance*** *is going to be* ***linked to your performance****. And I feel that* ***that is not a true reflection of what the teachers' capabilities actually are.*** *Sometimes you just have a low performing cohort or a low performing class, and that reflects badly on the teacher as well. So, it is quite stressful for a teacher to see that, you know.*" (Zara, female, teacher) [own emphasis]

The sentiment shared by most teachers during the data collection phase of this research highlighted the dissatisfaction with using student results as the sole measure of teacher performance. Teachers understood that their performance was closely linked and intertwined with the results their students produced, but they disagreed with the practice. In the literature review, performatively, studies strongly agree with this notion. The concept of teaching, as an educational undertaking and the essence of being a teacher, is fading in our current educational systems, being overshadowed by data-driven concepts lacking context and purpose (Daliri-Ngametua & Hardy, 2022).

The teachers unanimously acknowledged the importance of student results while also voicing their disagreement with the exclusive reliance on student marks for evaluating teachers. They pointed out that student performance is influenced by various factors such as task completion, attendance, and home circumstances. This flawed fixation on student results aligns with Power and Parkes's (2019) paper on the philosophical thinking of neoliberal reformers.

As Zara mentioned, student performance does not provide a comprehensive reflection of teachers' capabilities. Other essential aspects, such as classroom engagement, student relationships, collaboration with colleagues, and fostering an optimal learning environment, are neglected in the assessment of teacher success. This concern was echoed by several teachers

who felt that their overall effectiveness was not adequately captured when focusing solely on student results. As Pete shares below, only looking at marks and data is deceptive:

> "*So it's looking at the data is deceptive sometimes so you always have to, always have to contextualise it.*" (Pete, male, SGB representative teacher)

This need for contextualisation to allow for the inclusion of students' situations was mentioned by several teachers. By reducing students and teachers to mere data removes the human element to teaching by dehumanising and demoralising education (Daliri-Ngametua & Hardy, 2022). Amina agrees and elaborates on some of the other factors that need to be taken into consideration for contextualisation, and that data alone do not provide an accurate reflection of the teaching practice and teacher performance:

> "***It doesn't give a good reflection of what's going on and what's truly happening****. So it's like, yes, now we have all of this in place … if something doesn't work because have I actually looked at **the other factors around the numbers**, the other factors need to be included too because we can't just sit there and say a child can't learn … What if there, if there is something really wrong …*" (Amina, female, teacher) [own emphasis]

Interviewed teachers repeatedly raised concerns about students' lack of engagement, attendance, and participation in extra classes. They noted their efforts to extend workload and provide interventions, contrasting with students' inadequate investment, resulting in a perceived system failure. Emily emphasised the necessity for students to treat additional learning seriously for interventions to be effective. Without students' commitment, the interventions lose their purpose and effectiveness, as she asserted:

> "*Then, if they don't rock up, I mean, they literally look at me and then they leave the letters on the table and I, you know, what must I do? … No, they don't take it seriously at all…. So, it doesn't work*". (Emily, female, teacher) [own emphasis]

Teachers voiced their opinions on the reasons they believed the interventions were ineffective. Expanding on Emily's perspective, they noted that raising students' marks is unattainable if the students lack commitment. Amina concurred, advocating for a contextualised understanding of data and student results. She emphasised that evaluating a teacher's success should not solely rely on numbers, as various factors affect student learning. Nonetheless, when students do not show improvement, attention shifts back to the teacher, as Amina notes:

"*I think, at the end of the day, the **teachers are always bearing the brunt** for everybody, everyone else. What everyone wants you just have to go with but, ja, I don't think, like, yes we **are looked at in terms of our well-being** and stuff but I don't think there is enough **input on our teaching space and the students**.*" (Amina, female, teacher) [own emphasis]

Amina's perspective showed that teachers were aware of being assessed based on student results and were burdened with sole responsibility for these outcomes. External influences on students' results are disregarded, leaving teachers to bear the weight of expectations without due consideration. Amina questioned the absence of concern for teachers in this approach, both in terms of their well-being and their input into the learning environment. This fixation on results detracts from the human connection core in teaching, ultimately erasing it from the educational landscape.

The focus on student results is prevalent at North High School, driven by data analysis and performance management processes. Teacher evaluation is primarily rooted in student outcomes, with minimal allowance for context or external factors. This narrow emphasis makes teachers prioritise scores over holistic student development, as highlighted in Gray and Seiki's work (2020). As teachers strive to improve results through interventions and additional tasks, their success is solely measured by these outcomes, disregarding the broader context influencing students' learning.

The exclusion of relational and contextual elements leaves teachers disconnected from the data, eroding their sense of identity and value. The injustice of demoralising and devaluing teachers and students to mere numbers rests heavily with teachers as it contradicts the altruistic motives many teachers hold. Being reduced to mere numbers on a page goes against the very soul of many teachers (Ball, 2003).

Despite the negative perceptions of the performance management system, moments of inspiration and belonging emerged among teachers. Reflection and sharing led to the creation of communities of practice, offering a sense of agency and connection. The subsequent section explores these effects, further studying how North High School's operationalised performance management impacts teachers on relational and objective levels.

5.3.2.2 Effect Five: Reflection and Sharing

Views or perceptions can be categorised as negative or positive, depending an individual's

intellectual responses to complex situations. The following relational effects of performance management on teachers highlight positive viewpoints expressed during interviews. Notably, these were linked solely to relational factors, in contrast with internal or personal effects that negatively impacted teachers' well-being.

The literature review reports that effective implementation of performance management by school leaders, featuring healthy goal-setting and feedback mechanisms, can prompt teachers to engage in internal reflection and knowledge sharing. Improvement centres on teachers' ability to reflect on their practices and share insights with colleagues (Parcerisa et al., 2022:12).

The performance management system at North High School requires teachers to analyse their classroom data in a variety of ways, implement interventions and put improvement goals into place. Through this process, teachers are required to reflect on their current students, subject, and classroom practices. Furthermore, this reflection occurs individually but also in group subject meetings. Modern teachers have now accepted and embodied the new ways of accountability and datafication. Teachers themselves are now professors of data, analysing, reflecting, and using the data (Lewis & Holloway, 2019:11-12), such as with the teachers of North High School.

In her interview, Amina spoke about how she identified the gaps in the student's knowledge through her data analysis and pondered on why the gaps were there and what information the student has missed. She maintained:

> "*I mean, it opens it shows up the gaps. Gaps in what we are teaching our kids. Is there a gap between us and the kids because … we assume a lot. What, what is the gap there? Where are we missing that valuable information? What is going on but also as much as the evaluation is a number based it's easier.*" (Amina, female, teacher)

North High School requires all the teachers to utilise their data analysis, not only to implement the intervention but to create their personal improvement plans. Each term they are required to give feedback on how they have progressed regarding their goals. Jen mentioned that, by utilising the data, along with her improvement plan, she creates a reflection tool:

> "*You come up with them yourself and then **you can always reflect on it** in your next improvement plan … I think it is useful to see their marks and to see whether they are achieving their goals…. I **think it's a useful reflection tool**, and that is,*

*that is more or less what I use it for. I think it's also, you have to sit and just think about **what am I going to do differently**? And this also just aids in getting those thoughts going, like I need to improve and **it's a creative process**. You can't just Google, like what can I do to improve the kids' marks; you have to go sit and think about the learners in front of you, what's going to help them.*" (Jen, female, teacher)

As Jen shows, the process of reporting on your data and success as a teacher based on the student results, as well as setting goals of improvement, prompted her to contemplate ways in which she was able to modify her approach to improve future student performance.

Emily shared a similar response in her approach to data analysis and reporting. She agreed that knowing the reasons behind students' struggles required contextual understanding. Furthermore, she aimed to leverage this insight to boost her teaching strategies in the following academic year:

"*… because I need to understand where my kids are struggling. That is something that is important to me, **I need to address why they are struggling. And what context they are struggling with**. So, yes, I will get there … I will have to analyse the data, **I'll have to take initiative** and I will have to go okay, this learner, that learner, that learner in grade … so next year, when I have the next group of Grade 10s, I need to focus on that specific concept. Or I need to add remedial work or consolidation work for term two's project.*" (Emily, female, teacher)

Emily utilised data analysis to integrate remedial aspects into her curriculum planning for the following year, reflecting on ongoing student challenges. This highlights the power of teacher reflection and planning, benefiting students' future results. Zara also agreed, finding the data analysis and performance management process valuable in identifying areas of student struggle and devising improved strategies for approaching challenging topics, as she said:

"*You know, you would get to see one of the strongest points of your learners is because obviously, you know, some of the work varies in difficulty. So it also gives me an idea of how I need to approach the difficult topics, and how I can level my teaching and my classes.*" (Zara, female, HOD)

Zara utilised data analysis and her performance management process to adapt her teaching pedagogies to meet her students' needs. Her reflective practice and performance management directly influenced her classroom approach and teaching methods.

Dan, the Principal of North High School confirmed that a key reason for the data-led performance management process was for teachers to "become professors of data" and "teaching to the data" as indicated in the literature review (Lewis & Holloway, 2019). He added:

> "*The teacher, **the reflection,** the teacher looking at his or her **performance** and how it stands with the rest of the **results**. Because it also allows the teacher to see… moments of enlightenment … So, **they assume greater responsibility for their lesson** for **how they deliver the curriculum** and, more specifically, for the performance of the learners. So that is the beauty about the data and you know.*" (Dan, male, Principal) [own emphasis]

Dan guided the performance management process at North High School, emphasising teacher responsibility through reflection and sharing based on student results. He believed that data analysis and the school's performance management system encouraged teachers to improve and learn from data. This approach aligns with the positive outcomes identified by Parcerisa et al. (2022:15) in accountability systems.

Teacher sharing is another positive consequence of the performance management system. North High School requires that subject teachers meet regularly to discuss data and improvement plans to enhance student results. This practice particularly benefits newly qualified teachers, encouraging idea exchange, input on goals, and collaborative learning as Jen explained:

> "*And then we have a subject meeting every term, where you can also listen to what the other teachers are doing in your faculty and then ja, **learn from them** as well. So, I know one of the teachers … Every test that she had the learners write, the first question was: how many hours, or how much time did you spend studying for this test? To just get the meta-cognition going from like, my mark is going to correspond with the effort that I put in. And I think that's quite cool.*" (Jen, female, teacher)

Jen offered an example of the benefits of sharing ideas to support students' commitment to their studies. She now utilises a similar approach in her classroom. As a newly qualified teacher, Jen effectively assimilated advice from colleagues, applying it to her classroom practices.

Pete also spoke to the subject teams sharing information and working together:

> "*We sit as a team, and we set up our subject improvement plans. What we're going to do to improve the marks in our subject as a team. We discuss things that worked for us in class, so we've got a **little brainstorming session together**. We say okay, one of the teachers said she's been having successes in her class when she tries this approach, then we discuss how we can apply that.*" (Pete, male, teacher)

Like Jen, Pete also highlighted the collaborative efforts of teachers in sharing instances of success and collectively strategising for subject improvements in the subsequent term. He mentioned that the practice even involved bringing printed copies of plans to facilitate the sharing of insights, adjustments, and learning within the team.

> "*… print out our improvement plans … and then we speak about what is the change that we saw and why … so then we decide what to focus on.*" (Jen, female, teacher)

The value of this sharing practice becomes evident as teachers willingly exchange successful strategies, teaching techniques, lesson plans, and tasks.

Many of the teachers interviewed in this study were newly qualified teachers. This was due to the school only being in operation for three years at the time of data collection, as well as the school's policy to recruit newly qualified teachers. Given their recent entry into classroom teaching, these teachers actively engaged in seeking and sharing approaches and ideas. This sharing was particularly pronounced among newly qualified teachers, who felt compelled to contribute and reflect on their experiences, as Amina shared:

> "*I had a discussion with Alona, and she gave me some stuff to use for next term.*"

Jen and Pete agreed that the teams share useful information, inform each other and work well together:

> "*Yes, yes, definitely. It's really useful to me to hear what other teachers are doing … they are both still studying. So, just to hear about like what techniques they are learning in their studies and them implementing in class, ja, that helps a lot.*" (Jen, female, teacher)

> "*I think we work quite well together. We might need more regular meetings in that sense, but we do it about once or twice a term where we get together and we discuss that type of stuff … so we definitely inform our teaching and our methods*

and how we approach our assessments." (Pete, male, teacher)

The above-mentioned discussion, including quotes and data, highlights that North High School's performance management system has cultivated a culture of sharing practices, materials, and expertise among teachers. This sharing practice, formalised through subject meetings, is further enriched by newly qualified teachers seeking innovative teaching methods as they enter the profession.

Moreover, the data-driven performance management system has prompted individual and collaborative reflection among teachers on their instructional approaches. The incorporation of personal goal-setting by teachers has motivated them to identify areas for improvement in their teaching practices, aligning with their work objectives. These positive outcomes are perceived as constructive consequences of the school's performance-focused management system. While not impacting teachers on a personal level (unlike the first category of effects), these affirmative outcomes have empowered teachers to reclaim some of the agency and advocacy they might have felt had been diminished in other facets of performance management. This aligns with the themes of datafication, reflection, and sharing as discussed in the works of Parcerisa et al. (2022:15) and Lewis and Holloway (2019).

5.3.3 Sub-Question 2 Summary

In the exploration of research sub-question two above, the data were presented through a series of effects that the performance management system exerted on teachers at North High School. These five effects were thoroughly examined and discussed to highlight the insights derived from the study's data analysis process, which involved identifying leading themes from the interview responses. These themes encompassed areas such as anxiety, demotivation, increased workload and administrative burden, a resulting narrowed focus on learning, and lastly, the encouragement of reflection and sharing. The initial trio of effects were classified as influencing individual teachers and their perceptions, revealing emotions of vulnerability and a sense of diminished agency and autonomy. The latter two effects were categorised as having an impact on a relational or objective level. In these instances, teachers expressed their concerns about the inequities arising from the emphasis on student results as the key indicator used for measuring teacher success.

Nonetheless, some teachers make an effort to find ways to navigate the school's data system, resulting in moments of positivity. Notably, instances of optimism emerged when teachers discussed the formation of communities of practice dedicated to reflection and sharing. This

trend was particularly pronounced among newly qualified teachers, who constituted a significant proportion of the school's staff composition.

5.4 Chapter Summary

As relayed in the literature review, Ball (2003:216) describes performativity as

> "a technology, a culture and a mode of regulation that employs judgments, comparisons and displays as means of incentive, control, attrition and change – based on rewards and sanctions (both material and symbolic)."

On analysing the data and discussions on the findings associated with the first research sub-question, namely, teachers' views on how performance management is operationalised within the collaboration school, but particularly the second research question of the finding focusing on the teachers' perceptions on the effects of performance management at the school, it becomes evident that Ball's notion of performativity is vividly demonstrated at North High School.

The finding of the first sub-question revealed two central themes. Firstly, the performance management framework within the collaboration school necessitated compliance with two distinct governance systems, leading to confusion as teachers had to navigate two sets of rules. This markedly curtailed teachers' autonomy as they observed the additional compliance constraints. The second theme examined the role of leadership and management in administering performance management at North High School. Areas of concern included the management of teacher contracts, communication, and transparency within the school system.

The second section highlighted five emergent effects divided into those affecting teachers personally and those carrying relational implications. In the first category, teachers reported heightened anxiety, stress, demotivation, and an expanded workload accompanied by increased administrative tasks. Ultimately, these experiences left teachers feeling powerless, with reduced agency and autonomy. The second category strongly conveyed a sense of injustice stemming from the school's narrow learning focus driven by an overemphasis on data and student results as the primary indicators of teaching and learning success. The school's preoccupation with numerical indicators dehumanised both students and teachers, undermining the pedagogical influences within the classroom. Lastly, instances of positive moments were recounted by teachers, where they felt a sense of belonging through shared reflections.

This chapter provides the analysis of teachers' views on performance management at North High School reveals the pervasive influence of performativity. The understanding of Ball's concept of performativity aligns seamlessly with and enhances the comprehension of the dynamics at play within North High School. Upon post-data analysis, it became apparent that a macro-concept was needed to encompass all the effects observed above. The concept of performativity serves this purpose and is explored in greater detail in the next chapter.

CHAPTER SIX
SUMMARY, SYNTHESIS AND RECOMMENDATIONS

6.1 Introduction

This chapter concludes the research study aimed at understanding teacher experiences within a public-private school system's performance management. It offers a concise summary of research findings and synthesises these with cross-cutting themes, harmonising data with the reviewed literature. Recommendations for policy and practice, along with suggestions for future research, are presented, underlining the study's contributions to knowledge, policy, and practice.

The study found that teachers perceived performance management as an anxiety-inducing and motivation-sapping process that prioritised accountability over support and progression. Teachers conveyed sentiments of undervaluation, disempowerment, and restriction owing to the system's inflexible, standardised structure. They also highlighted the importance of connection and sharing as key motivators to teacher agency and belonging. Drawing from these findings, the chapter provides recommendations for policy and practice. These include prioritising teacher well-being, instituting adaptable and tailored performance management approaches, and emphasising professional development and advancement.

The study also identifies areas for further research, such as investigating inclusive stakeholder voices in collaboration schools. Ultimately, the chapter highlights how this study enriches broader knowledge, policy, and practice providing insights into the complex and nuanced nature of teacher experiences of performance management in collaboration schools.

6.2 Summary of Research Findings

A summary of the findings based on the research questions is provided, followed by a synthesis of the cross-cutting themes that emerged from the data theorisation.

6.2.1 Summary of Findings RQ1:

What are teachers' views of how performance management is operationalised within the school?

Research on how performance management is operationalised within the collaboration school

studied highlighted concerns stemming from the coexistence of two educational governance systems. Several researchers (see Chapter Three), having studied PPP in education, caution against the use of two systems of governance at the same time. Collaboration schools, such as North High School are financed by government as well the operating partners, and both feel validated to request that their requirements, regulations, and operational agendas be followed by the school.

Study participants expressed the challenge of having to navigate between two often conflicting systems within the governance structure of the collaboration school, likening it to "obeying two gods" (Yasmin, participant). This led to chaos and confusion among school staff, particularly regarding the role and procedures of the SOP. The freedom and limitation of within the collaboration school was unclear, especially pertaining to performance appraisals, causing uncertainty about which system to follow.

Moreover, participants felt a lack of autonomy as they attempted to navigate the delicate balance between these conflicting educational governance systems. Despite being viewed as self-governing, teachers felt torn between meeting the expectations of both systems, leaving little room for "*autonomy to make decisions around how best to manage their teaching and learning space*" (Zara, participant). When teachers in the collaboration school sought to transform and take control of their teaching and learning approaches, they were deprived of this, leading to significant frustration.

Another prominent finding regarding the operationalisation of performance management in the collaboration school was the role of leadership within the governance framework. Within the oversight of performance management processes, two subthemes emerged: the management of teacher contracts, and the approach to communication and transparency by the management.

North High School has been a part of the new education governance reform system and has experienced shifts in school ownership during its brief three-year existence. The findings revealed that this state of upheaval had implications for teaching staff, particularly in terms of their contracts and employers. Participants noted the need to amend or resign contracts, leading to confusion about job descriptions, expectations, obligations, and tasks and employer dynamics. The lack of clarity surrounding employer-employee relationships generated uncertainty in performance evaluation, job security, and contractual obligations.

Lastly, the findings showed teachers concerns about communication and transparency issues,

which they attributed to leadership and management within the school. Participants described situations where matters were "*lost in translation, not communicated clearly and last minute*" (Emily, participant) leading to confusion, anxiety, frustration, and a sense of unappreciation. These communication challenges extended not only between management and staff but also within the management team itself. These miscommunication issues were exacerbated by transparency concerns in the performance management process.

The transparency inhibiting directive was introduced by a previous operating partner at North High, entwined within the school's governance procedures. Screened knowledge became a norm for SOPs, enforced through non-disclosure agreements. This arrangement, where de facto employers maintained distance from staff and interacted solely through middle management, resulted in conflicts where the principal and school management team were left alone to deal with difficult matters and contractual conversations.

The findings from the research question looking into teachers' views of how performance management is operationalised showcase the importance of leadership in the performance management process. North High School navigates uncharted territory by implementing a new education reform and adjusting to evolving governing structures within this context. To effectively motivate and develop teachers, North High School must address concerns stemming from the operationalisation of performance management and successfully steer through conflicting governance systems to reduce confusion and address issues related to autonomy, communication, contracts, and transparency.

6.2.2 Summary of Findings RQ2

How do teachers' perceive the effects of performance management at the school?

Data collected from North High School participants revealed the school's use of a data-based performance management system to evaluate teachers, primarily based on student results. Findings on the impact of this system's implementation, management, explanation, and administration identified five main perceived effects on teachers. These effects were categorised for further insight as follows: those personally affecting teachers and those influencing them objectively and relationally.

Individually, the performance management effects on teachers included anxiety, stress, demotivation, and an increased administrative workload. North High School teachers were expected to demonstrate interventions for improving student marks, which teachers believed

were discussed at SGB meetings. The stress around increasing student marks was so high that one participant even started crying. This heightened stress reflects emotional labour with teachers needing to regulate their emotions in the classroom. Several teachers spoke about how they were "*neglecting personal matters*" (Amina, participant), asking "*what am I doing wrong?*" (Yasmin, participant) and referred to the "*massive amount of pressure*" they felt (Emily, participant).

The second effect experienced was demotivation. As North High School emphasises student data as an indicator of teacher success, teacher motivation directly links to student performance. Within challenging community circumstances and the erosion of teacher agency, the sole focus on increasing student results undermines teacher-student relationships and mindset shifts, leading to feelings of being "*demoralised*" (Yasmin, participant) and "*bummed out*" (Jen, participant) and how teaching can be "*soul destroying*" (Dan, participant).

The last individual effect of the performance management system centred on administrative burden and additional tasks without allocated time. Participants must complete tasks over weekends, finding the process cumbersome*,* "*time-consuming*" *(*Amina, participant), and unnecessarily "*burdensome/heavy*" (Dan, participant). Any potential benefits are therefore lost. Additionally, the school's focus on intervention and data worsens workload-related distress. Teachers are required to increase their efforts to incorporate a failing system, which places significant administrative, data-related, and time-related demands on them.

The second group of effects observed among participant teachers impacted them objectively and relationally, influencing their interactions, environment, and practices. The primary effect in this category was the narrow focus on learning. North High School's emphasis on student results removes holistic observations, human connections, and advocacy from key performance indicators. Participants wished for a broader assessment approach, acknowledging "*other factors around the numbers*" (Amina, participant) and "*have to contextualise it*" (Pete, participant). Neglecting this perspective left participants feeling unsupported and consistently bearing pressure without attention to their well-being. The strong results focus led teachers to concentrate on raising marks, overlooking the holistic development of students and teachers.

Despite the negativity, instances of teacher connection and recovery of agency emerged during the study. This final effect arose from reflection and sharing among young and new teachers, forming communities of practice supported by the school. As the school had a policy to recruit mostly newly qualified teachers, encouraging processes that foster teachers to reflect

and share will ultimately improve performance. Teachers at North High are required to engage in data analysis and reflect on classroom practices linked to data for personal development goals. This reflection occurs privately and in group meetings, promoting innovative solutions and creativity in teaching practices. These reflections and successes are shared in meetings or among subject staff, promoting mutual learning, particularly among newly qualified teachers. This process nurtures learning and a sense of belonging, connection, and hope.

The findings on teachers' perceptions of performance management effects can be categorised into those affecting teachers personally and those impacting them objectively and relationally. The personal effects of the performance management system are negative, causing anxiety, demotivation, increased labour, and administration. When examining findings on a relational and objective level, participants noted how the strong results focus hindered holistic teaching methods and eroded teacher agency at the school. However, some teachers found ways to work positively with school data and established communities of practice, fostering belonging and hope, especially among newly qualified teachers.

Given the research finding noted above, the next section synthesises them, highlighting cross cutting themes and lessons derived from the study.

6.3 Synthesis of Research Findings

The objective of this study was to understand a new educational reform in SA, and educational PPP, involving the outsourcing of school governance to private stakeholders, in a model called collaboration schools, at a single PPP school in the WC. The study aimed to incorporate the voices of teachers into the existing body of knowledge regarding the implementation of governance structures within an educational PPP.

Upon analysing the study's data and outcomes, several overarching themes emerged. These themes emerged from the data and the relevant literature, as well as the framework and broader societal context of SA. These synthesised themes contribute a deeper contextual understanding, enriching the response to the research question: *"What are the teachers' experiences of the performance management system in collaboration schools*?" This synthesis of cross-cutting themes enhances insights and comprehension of the research problem, augmenting the knowledge base concerning collaboration schools in SA. Particularly, this enrichment extends to the operational governance structures within these schools, including the performance management systems.

The subsequent sections provide a detailed discussion of these cross-cutting themes.

6.3.1 Governance at a Distance

When examining the findings, specifically in response to research question one, "*what are teachers' views of how performance management is operationalised within the school?"* the cross-cutting theme of "*governance at a distance*" became evident.

Since the mid-1980s, global governance structures have shifted away from bureaucratic and traditional models towards networked, outsourced, and decentralised governance forms. These approaches, known as "governance at arm's length", involve a complex blend of targets, inspection, and management styles derived from new public management and neoliberal techniques (Baxter & Cornforth, 2021:5). In the past, central governments directly managed schools, principals, and staff through provincial offices. However, the current trend delegates governance and management to networks, service providers, and third parties such as SOPs. This transformation brings about significant deviations and challenges in accountability and undermines the democratic ideals of the South African Schools Act (SA, 1996b) (Sayed & Soudien, 2021:128).

The erosion of transparency and public accountability was a core concern highlighted in the study. Moreover, this erosion is intensified by neoliberal methods influenced by new public management styles.

This *erosion of public accountability* and *transparency deficit* as indicators of governance at a distance are described below.

6.3.1.1 Erosion of Public Accountability

The erosion of public accountability is intertwined with governance and decision-making modes. Over the past decades, governments worldwide have decentralised education to further community involvement. This shift stems from new public management and neoliberal ideologies that view learners and parents as consumers, thereby advocating for choice in education delivery, even if state-funded (Sayed & Soudien, 2021:136).

In the context of collaboration schools, this distortion of accountability causes uncertainty particularly concerning performance management as a governance factor. Interviews revealed concerns about employment contracts, discrepancies, instability, and confusion regarding job

descriptions. Establishing clear performance measurements and guidelines during private-public partnerships, such as collaboration schools, is crucial for effective performance management implementation (Heystek et al., 2014).

Performance-based governance can constrain teachers, especially when they already have to navigate conflicting governance systems. Teachers at collaboration schools expressed a desire for more autonomy, particularly in curriculum, performance management, and classroom practices.

Decentralisation shifts accountability from traditional to performance-based models through distant steering, outsourcing, and partnerships. Private entities replace the state in this arena. Decentralisation retains some control, integrating diverse monitoring mechanisms aligned with neoliberal views like standardised testing and performance-based accountability. This transition questions genuine responsibility and erodes democratic accountability by involving numerous decision-makers, hindering coherent functioning (Ehren & Perryman, 2018:13).

The teachers interviewed highlighted the delicate balance between the two middle management structures as the SOP operates in the same space as the WCED representatives within teachers' perceptions. They faced confusion and conflict while navigating governance and accountability duality. The decentralisation of education notably impacts middle-tier structures. In instances like collaboration schools, adding SOP to governance forms an undemocratic middle-tier structure. This transformation reshapes hierarchies, exacerbating complexity, and fragmenting place-based school support and reporting systems (Greany, 2022; Ehren & Perryman, 2018).

As the government delegates educational governance to SOP and funders, accountability lines blur, eroding democratic integrity and yielding unequal power dynamics; SOP holds 50% of SGB power, donors control SOP finances, and staff shift from WCED to SGB. However, the significance of school operation partners' 50% voting rights on governing bodies transcends mere power dynamics. In public schools, democratic processes elect those governing the educational system. The South Africa Schools Act promotes democracy and self-accountability, mandating at least 50% parent representation on SGBs, alongside teachers, leaders, and students. Collaboration schools erode public accountability by removing democratic accountability measures given, as third parties lack the public democratically voted mandate to govern schools.

Removing public accountability and introducing private stakeholders into a once public domain

results in a simultaneous lack of transparency. Private stakeholders lack the natural commitment to accountability found in custodians of public welfare. This divergence leads, as demonstrated in the study, to transparency challenges permeating all levels of governance and accountability.

6.3.1.2 Transparency Deficit

A consequential effect of removing schools from public accountability structures is the lack of transparency. At North High School, teachers faced communication and transparency issues leading to confusion and disconnect, causing frustration and underappreciation. This disconnect inhibits a successful performance management system reliant on trust and transparency between employers and employees. Transparency is a fundamental aspect of accountability; indeed, accountability cannot exist without transparency.

North High School teachers were side-lined when voicing transparency concerns, marginalising their role in governance and policy dialogue. Deliberate barriers were evident; teachers were selectively informed as knowledge was screened as confirmed by non-disclosure agreements from SGB representatives. Such tactics create distance between teachers and the SOP, insulating the latter from issues and conflict such as contractual matters. Despite claims of inclusion, community and teacher voices often remain ignored, as observed in the research.

6.3.1.3 Summary of Governance at a Distance

Governance through third parties, networks, and service providers creates barriers to accountability, eroding democratic responsibility in favour of private accountability. This shift echoes global trends where private sector involvement blurs public-private boundaries (Sayed & Soudien, 2021:135). These barriers lead to fragmentation, miscommunication, and confusion within governance structures, vertically and horizontally, impacting roles and responsibilities. Decentralisation necessitates new control mechanisms aligned with neoliberal performance-based outcomes, which adversely affect teacher autonomy and advocacy.

A lack of transparency and utilisation of screen knowledge barriers at North High, ensure that conflict situations remain distant from those in higher governance and accountability levels, insulating them from responsibility and blame. This system burdens school principals and management teams, holding them accountable for matters beyond their control as they execute the SOP and WCED directives.

The system decreases the ability of the school management team to focus on its supportive role for teachers and to guide them through the performance management processes. It undermines the viability of a successful performance management system due to unclear roles, barriers, and power dynamics.

As blame shifts, clarity on responsibility is lost. When the state absolves itself from public education service delivery, it distances itself from conflict and blame. Failures are attributed to operating partners, not the state, reshaping public beliefs and democratic ideals, while masking behind the justifications of the model being evidence of responding to calls for improved public education (Sayed & Soudien, 2021:129-130).

In collaboration schools, the government assigns the SOP the role of governing, yet the public elected the state, not the SOP. Despite this, the SOP asserts that collaboration schools remain state institutions. Shifting accountability creates murky governance and erodes democratic responsibility, allowing private players to secure positions in the public sector which the state can no longer control.

The above concerns over accountability and transparency align with initial research on collaboration schools by Gamedze (2019:89) highlighting the lack of clarity, unclear accountability chains, power imbalances and deficit shifts in democratic accountability. Similar concerns, echoed by Greany (2022), Baxter and Cornforth (2021), Sayed and Soudien (2021), and Ehren and Perryman (2018), confirm shifts in governance within educational reforms and neoliberal structures hold multiple concerns. Concurrently, governance changes tied to neoliberalism create performance-based control mechanisms and the development of administrations systems of performativity emerge as neoliberal governance methodologies as shown below.

6.3.2 Performativity: Forms and Effects

When looking at the synthesis to the findings, particularly answering research question two, "*How do teachers' perceive the effects of performance management at the school?*", the cross-cutting theme of performativity and a new type of teacher emerged as demonstrated below.

Incorporating a literature review of performativity became essential during this study. As data analysis progressed, it became apparent that a comprehensive and conceptual framework was required to aid in theorising the macro-level outcomes that were arising from the research. After further deliberation and study, the concept that best aligned and provided conclusive

explanatory constructs was that of performativity, initially introduced to academia by Stephen Ball in 2003. According to Ball (2009:217), performativity is posited as a contemporary form of state regulation enabling governance in an "advanced liberal" manner. It compels individual practitioners to self-organise in response to targets, indicators, and evaluations, necessitating the suspension of personal beliefs in favour of a calculated existence.

Several of the findings align with performativity and the effects of performativity. The section below explains and describes how the performativity narrative can be included as a cross-cutting theme to add a conceptual understanding of the outcomes of the study. These are explained through two categories related to the demonstration of performativity as it relates to this study. The first category denotes the constructs of performativity as revealed in the study. The second category highlights aspects of performativity as they effect teachers both on a personal level and a professional level.

Firstly, the two forms in which performativity in this study manifested, namely, datafication and the fixation on student results, are examined below.

6.3.2.1 Forms of Performativity

The first category focuses on how performativity manifested during this study through the constructs of datafication and the fixation on student results as explored below.

6.3.2.1.1 Datafication

The first indicator of the new mode of regulation, which is a characteristic of performativity as noted in this study, is evident in the pronounced requirement for copious volumes of data at North High School and the persistent datafication of nearly all areas of teachers' responsibilities.

Performativity, as a regulatory framework governing teachers' professional conduct, mandates the constant generation of data to facilitate oversight and evaluation. This necessitates copious amounts of data, entailing its creation, organisation, conceptualisation, and presentation by educators. This phenomenon of data-driven transformation has led to an overwhelming amount of data created within educational institutions (Singh, 2018), including at North High School.

This process of datafication, as uncovered through the teacher interviews, is frequently

onerous and susceptible to data redundancy. The prescribed interventions introduce their own set of challenges and additional administrative duties where a lack of support from parents and the school system undermines the effective implementation and impact of intervention strategies.

The study highlighted that the emphasis on data exacerbated teachers' workloads and administrative responsibilities. The literature review notes that performance management processes burden both implementers and participants. Essential data generation for performance management demands time allocation. However, schools, including North High School, inadequately allocate this crucial time, compelling teachers to extend their work hours and sacrifice personal time to meet data compilation and administrative demands. Moreover, teachers face challenges in independently handling administrative tasks and data analysis, often struggling with understanding the stipulated requirements.

Regulating teacher professional conduct through datafication and performance monitoring is intended to enhance transparency and address challenges within the education system. Yet, data inherently oversimplify intricate relationships among teachers, students, schools, staff, and parents, reducing them to check boxes and mere numbers (Singh, 2018:491). Vital aspects of traditional teaching practices, crucial for students' learning environment and ease of education, defy quantification. Experienced teachers employ methods that build student confidence, establish connections, and address barriers to learning and behaviour. These nuanced professional approaches elude data capture, suppressed by the prevailing data-centric focus, which side-lines teachers' insights on such matters (Daliri-Ngametua et al., 2022). Teachers are burdened by datafication requirements, needing tangible proof to validate their worth and professional judgment, not just within the education system and school management but society at large.

The inundation of data in education also triggers adverse effects, with datafication and performativity emerging as leading causes for teachers leaving the profession. As indicated by the literature, teachers often attribute their departure not solely to workload but to the nature of the workload, particularly the demands of performativity. Teachers become teachers for altruistic reasons but the reality of the work, the propagating of data needed to regulate and monitor their success, validate their professional stance and the governmentality rules of the day, dull teachers' passions until, ultimately, they leave the profession (Perryman & Calvert, 2020:2).

Within the context of performance management and professional development, North High

collaboration school unconsciously limit teacher agency and autonomy through datafication and constant monitoring. The limited space for teachers to pursue their classroom priorities and transformative pedagogies works against redress and equity.

The above highlights the alignment of the performativity narrative with the datafication of the teaching profession, substantiated by insights from interviewed teachers at North High School. The subsequent section delves into another performativity-related aspect: the fixation on student results.

6.3.2.1.2 Fixation on Student Results

The second form of a new mode of regulation founded in neoliberalism, which is a characteristic of performativity, as noted in this study, is North High School's fixation on student results. All the data collected were used to analyse improvement in student results, and consequently, to evaluate teacher performance.

During interviews several teachers expressed a desire for diverse criteria, not only the students' results, to gauge their teaching ability, success, and performance. This privileging and fixation of student results is a key marker of performativity. During interviews, it emerged that the data collected and analysed from students' results were used to identify teacher weaknesses and sections of the curriculum that teachers struggled to implement. Yet there was no evidence to indicate how teachers were supported in addressing these deficiencies. As noted by Gray and Seiki (2020:4), it is not that surprising that schools rarely provide safe spaces for teachers to acknowledge struggles and weaknesses identified through data analysis.

The school's teachers understood how the students' results functioned as a metric for their success, engendering a sense of fear among them. Teachers felt that students' results were a reciprocal process, in which the students' commitment and engagement were not adequately considered. As a result, they felt that the data were not a true reflection of their success. Given a different context, where students displayed more enthusiasm and receptivity towards learning, the outcomes might more accurately reflect their teaching. Teachers at North High School relayed that data can be deceptive when contextual elements surrounding the numbers are excluded.

One of the constructs of performativity and neoliberalism involves the focus on results and outcomes with no contextual or extended input measures. The teachers at North High School

showed great commitment to increasing results; however, fostering students' engagement and improvement required relationship building, time, connection and understanding. Regrettably, none of these factors are measured, monitored, or utilised as indicators of success for the teacher, and they are entirely disregarded in both the performance data and the subsequent analysis.

Performativity introduces invisible social control aimed at regulating teachers' professional conduct through data monitoring systems. The teachers' holistic and altruistic aspirations, aimed at making a genuine impact, fostering comprehension, nurturing future learning, instilling a passion for learning, connecting with the student, and educating the whole child, are left unfulfilled (Gray & Seiki, 2020:8).

Many authors in the literature review point out that reducing students and teachers to numbers dehumanises, demoralises, and devalues teachers. This study aligns with and further demonstrates how the standardisation of performativity measurement and control, through constant data collection and analysis pertaining to the students' results, disregards the teacher's professional ability and judgment in evaluating individual students and the teacher's ability to consider the pertinent broader social and cultural conditions impacting on each child's education.

The philosophy of neoliberalism, as discussed in Power and Parks (2019), is applicable here. Neoliberal reformers see teaching and education as a simple input-to-output system. They measure and assess solely based on output, disregarding students' and teachers' backgrounds, demographics, culture, teacher-student rapport, and those advocating for changes and inclusive learning. Neoliberal reformers are fixated on numbers and data aiming to show their version of quality accountability and fact-based success. The performativity measures used at North High School align with neoliberal reforms' concentration on output with no context.

Teachers no longer see students as complex individuals, influenced by various methodologies and genuine real human needs. Instead, they simply see students as a means to an end – a way to impart the necessary knowledge and ensure teaching to increase the results of performance success. Those students, whose marks do not increase despite the teachers' efforts, are perceived as hindrances and, instead of seeking to understand the whole child, they will be isolated from their peers. The system's direction for teachers to focus solely on student results and grades means that any support beyond the basic learning needs of the child is neglected.

However, this process of datafication and narrow focus on learning does not resonate well with many teachers. These changes impact teachers both personally, leading to increased anxiety and stress, and professionally, resulting in the emergence of a new form of teacher. These two levels of effects are discussed below.

6.3.2.2 Effects of Performativity

The second category of performativity highlights its impact on teachers, affecting them both personally and professionally. On a personal level, performativity amplifies teachers' anxiety and stress levels. On a professional level, it has reshaped the very essence of teaching, giving rise to a new type of teacher. The ensuing section will delve deeper into these two consequential effects.

6.3.2.2.1 Anxiety and Stress

The personal impact of performativity in this study emerges through the evident dissent among North High School teachers concerning performance management. The struggle over the teachers' very soul (Ball, 2003:217), endures as teachers display palpable discomfort as their beliefs (and their original altruistic reasons for entering teaching), and their daily teaching practices, continue to create professional dissonance and anxiety (Ball, 2003; Daliri-Ngametua & Hardy, 2022; Holloway & Brass, 2018).

At North High School, the pressure and conflict stemming from performativity-related factors was high. During an interview, a teacher was moved to tears while discussing distress stemming from the pressure to increase performance. Several of the teachers mentioned sacrificing personal time with their families to try and assist the students driven by the belief that they could make a difference.

Teachers at North High School spoke of their anxiety, demotivation, and self-doubt when they could not increase student results. Despite feeling like they went above and beyond to increase their performance, teachers were left questioning their efforts as the additional time and dedication they invested in fostering connections and engaging with students remained overlooked.

Teachers often struggle with the performativity narrative. Teachers enter the profession with hope, ideas, and notions of the teacher they aspire to become. But, when confronted with the demands imposed by the schooling system, they enter a crisis that prompts them to question

their self-worth, professional contributions, and interactions with students. In the context of neoliberal reforms, which exclusively employ outcomes for measurement, teachers find themselves pondering whether their efficacy hinges on their students' low results. Consequently, their very identity is negotiated due to the teaching demands (Sullivan et al., 2021:10-11).

The intense focus on "fix the teacher problem" (Singh, 2018:491) within performativity is well documented, as teachers endure subtle and blatant expectations about work, performance, assessment and defining the quality of teaching. The constant performativity narrative fosters heightened levels of uncertainty and instability, compounding the anxiety they experience regarding their monitoring and evaluation.

Early-career teachers navigate substantial levels of uncertainty and doubt as they grapple with the tensions between established effective teaching practices and the adoption of school-endorsed approaches centred on student outcomes and data-driven metrics of success, as shown in the literature review. As teachers struggle to increase students' marks, meet the admin and data demands of teaching, and fail to align their intrinsic teaching beliefs with mandatory practices, they experience elevated levels of anxiety and stress.

As Holmes (2005) notes, teachers contend with multiple stressors and anxieties including excessive workload, poor working conditions and administrative accountability demands. While most teachers theoretically welcome accountability, the stress they often experience around performance management stems from the implementation, criteria, and process of these systems. A 2017 study observed that 75% of teachers recorded mental and health issues relating to stress within 24 months (Holmes, 2019:21). Neoliberal ideologies and performativity regimes with their misjudged criteria and processes, contribute to teachers' stress, anxiety and burnout, resulting in mental and health issues.

The above effect of anxiety and stress impacts teachers on a very personal level. The next effect of performativity on teachers, namely, a new form of teacher, delves into how the performativity narrative affects teachers professionally through the emergence of a new kind of teacher.

6.3.2.2.2 A New Kind of Teacher

The second effect is that performativity impacts teachers on a professional level. Here, the performativity narrative has changed the nature of teaching giving rise to a new type of teacher

as shown below.

Changes in governance, the emergence of performativity constructs, and the consequential enhancement of stress all create new concepts and redefine notions of what it means to be a teacher and a member of the teaching profession. The system's fixation on data and the privilege of student results has had multiple effects on teachers, not only personally, but also on how they engaged with others, including students, and their approach to teaching and learning practices.

Neo-liberal education reforms that intensify market-related outcomes create new priorities in teaching, where data-responsive factors carry greater significance for teachers than historical indicators. Experienced teachers who have grappled with changes to education systems throughout their careers, present discomfort concerning their belief about effective pedagogical methods and their fundamental purpose for entering the teaching profession as they wrestle with the choice between adhering to their beliefs or succumbing to the pressures of conformity stemming from performativity constructs.

However, as mentioned, North High School, as a collaboration school, has a preference to employ Newly Qualified Teachers (NQTs) or those relatively new to the teaching profession. These teachers lack exposure to diverse educational systems, making them less prone to discord or resistance towards performance-based accountability measures, data-driven teacher methodologies and other neo-liberal reforms. Instead, they have adapted to seeking ways to utilise the tools enforced to their advantage.

North High School teachers utilise datafication processes and data analysis to identify areas of weakness or gaps in student knowledge. This then informs the creation of improvement plans that teachers are expected to report on. Beyond this, teachers use the data to define their success. Instances where the data indicated shortcomings lead to significant anxiety.

The data informed the teachers' understanding of the important aspects of teaching and whether they qualify as successful teachers. Several teachers used goal setting and evaluating progress as a reflective procedure to seek new methodologies to increase students' marks and ease anxiety. They adapted their teaching methodologies based on data analysis and performance management processes. The approach teachers adopt in the classroom is profoundly influenced by their reflection on data and outcomes from performance management.

This aligns with the literature that affirms that NQTs have accepted and embodied datafication and performance-based accountability practices in both their perception of what is important in teaching and their classroom focus as well as the criteria delineating an accomplished educator and effective teaching strategies (Lewis & Holloway, 2019).

Teachers now rely heavily on accountability systems' data to understand their performance, define success, and validate their roles. Trusting statistical analysis, this reliance undermines their self-worth as teachers (Gray & Seiki, 2020; Holloway & Brass, 2017). Teachers are confident in using statistical insights to validate their impact, preferring strategies that boost student performance and data outcomes. Modern teachers passionately engage with data, embodying true professors of data (Lewis & Holloway, 2019).

The consequence of teacher submergence into the world of datafication is that, even after acknowledging unfairness, injustice, or erroneous focus, teachers uphold the belief that data is ultimately correct. Performativity contributes to the re-professionalisation of teachers as teachers reshape their pedagogies into strategies to obtain student compliance and raise student test scores but are not about authentic development, care or expression of human connection. The focus on quantifying student performance shapes both the content and methods of teaching, as accountability tools capture only select data types (Gray & Seiki, 2020:5). This shift in pedagogies undermines teacher voices and devalues the teaching profession, resulting in "the disappearing teacher" (Daliri-Ngametua & Hardy, 2022:18) – a new type of teacher aligned with neoliberal ideologies.

Consequently, teachers divert from traditional indicators of effective or successful teaching such as creating student confidence, building relationships with students and parents, creating ethical leaders, promoting tolerance, and developing communities. In defining a successful teacher, participants emphasised increasing student results, data and completing the curriculum. While they entered the teaching profession aspiring to impact lives, they currently believe that the method to achieve this is to guarantee students' annual advancement with high results.

The study showed that North High collaboration school is fixated on student results and the recruitment of NQTs, which redefine the very essence of teaching. The changes in governance stemming from neoliberal education reforms where decentralisation creates privatisation opportunities in public education spaces and the concomitant emergence of performativity regimes, consequentially redefine the teaching profession's identity and our notion of what it means to be a teacher.

6.3.2.3 Summary of Performativity

Teaching is widely acknowledged as a difficult, often stressful career, characterised as an emotional practice due to the significant amount of emotional input, labour, and interventions required. High cortisol levels, a sign of physiological stress in teachers, particularly those employing emotional labour, can be linked to performativity's demand for such tactics. This demand, coupled with the dissonance between teachers' beliefs and school demands, contributes to burnout, health issues, and attrition (Wang et al., 2019). Schutz and Lee (2019) additionally note a strong correlation between high attrition rates among teachers and the emotional, anxiety-inducing nature of their work.

Given that new teachers are rarely prepared for the complexity of the school and community context, many exit the profession within their initial five years. Institutional systemic pressures from datafication practices and evaluation framework primarily fixated on enhanced student outcomes not only diminish teachers' potential but also obstruct their professional aspirations. This generates frustration, unsurprisingly leading to attrition due to pressures and negative effects of performativity as shown in the research findings.

Ultimately, the teacher we used to know and the meaning of being a teacher is disappearing and instead being replaced by concepts of data, statistics and numbers that lack context – an education system without a sense of purpose (Daliri-Ngametua & Hardy, 2022).

The study showed how performance management systems hold emotional significance for teachers. Performativity, as a new mode of regulation, rooted in neoliberal ideologies of datafication and a focus on student results, creates heightened anxiety and the study's findings highlight a direct link between performativity, teacher burnout, and attrition. Furthermore, these neoliberal principles, which create performativity, have fundamentally altered societal perceptions of teachers, thereby reshaping how teachers perceive themselves.

6.3.3 Summary of Synthesis

In the section above, the study reflected on the cross-cutting themes of governance at a distance and performativity. These cross-cutting themes are arguably part of the neoliberal global reform ideology that advocates for market-driven forces shaping social institutions, including education, intertwining public services with private influence (Powell & Parkes, 2019). Neoliberal reforms change governance structures and necessitate performativity. In doing so, the teaching profession is redefined. Collaboration schools embrace neo-liberal accountability

reforms, centralised around datafication, and shift the teaching profession's priorities. The study shows that these alterations in governance through uncertain duality accountability mechanisms potentially undermined teachers' professional autonomy and agency.

6.4 Recommendations

The following areas of recommendation taken from the study, considering the synthesis and findings, seek to place the themes discussed practically, contextually, and methodologically. It does this by looking at recommendations in terms of policy and practice.

6.4.1 Recommendations for Policy

In the WC, the creation of the collaboration schools project has polarised many individuals as a new educational reform, stemming from the UK Academies, emerged in the province. As high-level provincial state players created political alliances and impacted legislation, the implementation and lower-level policy creation has left much to be desired. Therefore, the policy focus on three tiers of accountability: firstly, to national and provincial legislation; secondly, to those overseeing the collaboration school projects; and thirdly, to the operating management level in schools.

Clarify Legislation for Accountability

Firstly, at a national and provincial state legislation level, the study identified a lack of transparency and confusion stemming from conflicting legislation between the Western Cape Education Bill changes and the South African Schools Act (SA, 1996b) where 50% of voting rights are removed from the parent body and given to the private operating partners.

Therefore, this study recommends that attention be paid to reworking provincial legislation as the current conflict with national policy should be addressed. The legislation needs to be remedied so that the post-apartheid common sense, constitutional values and vision and are not hijacked by politically motivated projects that have not demonstrated success in other countries.

Define Contractual Clarity

Secondly, as an administrator and overseer of the public-private project level, the study noted that the operating partner presence in the school blurs accountability structures concerning

teachers' contracts. This resulted in conflict, confusion, and a lack of transparency within the school environment.

Teachers in the collaboration school struggled to comprehend their employment contracts, which undergo frequent revisions, leaving them uncertain about their employers. This contractual uncertainty leads to confusion during the performance management process. Additionally, teachers grapple with understanding their employers' requirements in relation to state reporting and performance management requirements, resulting in conflicting compliance demands.

Therefore, a key recommendation is to define and clarify policies governing operating partners' roles as teachers' de facto employers, including performance management, training, and development. This will remove the current confusion on who teachers are accountable to. Creating clear, concise teacher employment contracts that define employment nature and employer identity is imperative. This should furthermore enhance employee-employer relationships.

Promote Teacher Profession Autonomy

Thirdly, at a school level, the study stresses the need for management systems to instil democratic accountability structures that encourage teacher autonomy and advocacy instead of removing them. Currently, the operating partners' performance management policies are strongly aligned with neo-liberal reforms and new public management processes, resulting in teachers feeling demoralised and that their performance evaluations neglect environmental and social contextual factors.

It is therefore recommended that the school management formulate performance management policies valuing teachers' professional autonomy and advocacy in shaping education. These policies should guide mechanisms within the performance management process, granting teachers the freedom to exercise professional judgment, contribute to teaching and learning decisions in context, and play an active role in their evaluations. Through policy collaboration, schools should be encouraged to prioritise holistic development and social well-being alongside academic performance. Achieving this involves integrating qualitative indicators and measures into evaluation and assessment frameworks which places greater emphasis on non-data factors such as relationships, cohesion, and ethics.

The above policy recommendations enhance the clarity of the collaboration school projects process and procedures. These recommendations aim to address challenges stemming from neoliberal ideologies, ultimately mitigating their impact on the South African education system and teaching profession, particularly within the realm of collaboration schools.

6.4.2 Recommendations for Practice

Transitioning from policy to practice, the ensuing recommendations address the operational aspects within collaboration schools and the implementation of policies or their absence. These directives target the SOPs and those overseeing the model, as they are embedded in the practical domain.

Enhancing Communication through Role and Responsibility Clarity

The study revealed a lack of transparency that has filtered down to the schools operations, resulting in communication barriers between operation partners, school management teams and teachers. Clarity on roles and responsibilities is imperative to counter this.

The study therefore recommends establishing clear roles and responsibilities to be key not only between the private sector and state but also within the schools and implementing SOP as well. All stakeholders involved at all levels of accountability should have a clear understanding of the roles and responsibilities they hold ensuring transparency within the school and community.

Removing Dual Performance Management Systems

Aligned with defined roles, greater clarity from the operating partner and the state is necessary regarding the performance management system to be followed, as the study uncovers teachers needing to operate and adhere to a dual accountability system. To alleviate confusion and administrative burdens, collaboration schools should adhere to one performance management framework – either state or private sector accountability.

An unintended consequence of performativity and data generation implemented by the dual systems includes decreasing teacher confidence, increased student anxiety and increased pressure from and on parents, families, and communities. It is recommended that collaboration schools be allowed to focus on one performance management system; this consolidation

would enhance teacher clarity, accountability, and the performance management process.

Embracing Holistic Performance Criteria

Lastly the study highlights how the collaboration school and neo-liberal reforms are fixated on student results. This narrow focus hampers teacher motivation and contradicts their intrinsic motivations for joining the profession. Encouraging a shift from over-reliance on standardised testing and data-driven approaches, the school should adopt comprehensive assessment methods that incorporate qualitative indicators and student-centred evaluations. Teachers should be provided with the flexibility to assess students' progress based on a range of factors, including relationships, ethics, and social cohesion, allowing teachers' expertise to guide assessment and classroom practices. This fosters a culture of continual learning and improvement and valuing teacher feedback.

The above recommendations aim to empower teachers, redefine accountability, and promote inclusive education practices. They envision a holistic, student-centred, and equitable education system. Implementing these recommendations requires robust leadership development to drive systemic change and support their application, thereby contributing to the growth and training of teachers.

6.4.3 Recommendations for Further Research

Drawing on the process, discussions, findings and synthesis of this study, the following recommendations for future research and studies are made:

Firstly, there are limitations to the study. The study was constrained by time and resources available to the researcher. A more comprehensive investigation encompassing all collaboration school governance models would enhance the understanding of educational PPP landscape in SA. With unlimited time and resources, conducting interviews with teachers from multiple collaboration schools could garnish a more comprehensive understanding of their perceptions concerning performance management. Furthermore, including interviews with other stakeholders involved in the collaboration school model would facilitate a holistic exploration of governance-related factors such as performance management.

Secondly, it is recommended that future studies look to diversity stakeholder perspectives. Beyond governance, stakeholders' voices of parents, students, and community members, particularly those who have been part of a transition from standard public schooling to a

collaboration school model, should be incorporated into the research discourse.

Lastly, exploration of governing documentation for collaboration schools, encompassing policies, legislation, memorandums, funders, evaluation reports, and financial reports, would significantly enhance the comprehension of the project's dynamics and overseers' viewpoints. This form of research would enrich the knowledge base by shedding light on project impact, success factors, and the rationale behind interventions employed. However, access to such documents is currently restricted.

These recommended research directions promise to enrich the existing understanding of collaboration schools, their governance, and their impact on SA's educational landscape.

6.5 Contributions of the Study

Having looked at the recommendations for policy and practice, the study now considers the contribution that the research and findings make to the body of knowledge.

6.5.1 Contribution Towards Body of Knowledge

This study contributes significantly to the current bodies of knowledge on educational private-public partnerships, particularly within the collaboration school model as it exists in the WC. It addresses knowledge gaps pertaining to new private management processes and the influence of neo-liberalism within these educational structures.

As the collaboration school model was only implemented in 2019, limited information exists about the structures and processes of the schools. This study enriches the existing knowledge by additional information and documentation. Access to information about the governance in collaboration schools has been restricted, hindered by barriers and a lack of transparency in sharing documentation and contracts with the public and researchers. Information on governance matters, including performance management systems, is not easy to access. The investigative nature of this research provides insight into these aspects contributing to this under-researched field. Not only does the study explore a collaboration schools' performance management systems, but it also builds upon and supports limited literature on collaboration schools by research by authors such as Sayed and Soudien (2021) and Gamedze (2019).

Previous literature lacked input into how performance management was operationalised within collaboration schools through teacher contracts and systems of teacher monitoring, evaluation,

feedback, appraisal and reporting. This study bridges this gap, adding to the discussion on governance concerns in educational PPPs, particularly academies as presented in the UK on which the collaboration school model was based. Utilising teachers as the unit of analysis for the study links it to the recommendations for future studies as suggested by Gamedze (2019). Furthermore, it offers insights into the dynamics and relationships within a collaboration school, particularly the perceived contractual relationships between teachers and operating partners as de facto employers.

The study contributes to the existing body of knowledge by framing performance management as a facet of new public management processes intertwined with neo-liberal reforms. It offers contextual understanding within the evolving landscape of education and sheds light on how these transformations are reshaping education governance.

6.6 Chapter Summary

The study aimed to understand teachers' experiences of performance management systems in collaboration schools. It explored how teachers perceived the performance management systems as they were operationalised within the schools, as well as teachers' perceptions of the effects of performance management at collaboration schools.

Using knowledge from the current bodies of literature and the participants interviewed, the research explored the voices of teachers as they navigated and understood their roles within a collaboration school's context. The study utilised a conceptual framework based on the literature, actors, and structures of the study. This yielded findings that align with the neo-liberal reforms pertinent to modern education trends. The study's suggestions contribute to enhanced governance, more transparent accountability structures, and improved teacher satisfaction within educational PPPs, particularly in the context of the collaboration school model implemented in the WC.

The research shows that the collaboration school model operates within the expected constructs of dual governance and neoliberal ideologies. However, it also observed the emergence of new teacher professionals created within the new reforms utilising communities of practice to connect and share knowledge.

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Appendix A: Ethics Approval Letter from CPUT

Cape Peninsula
University of Technology

Cape Peninsula
University of Technology

Private Bag X8, Wellington, 7654
Jan van Riebeeck Street, Wellington, 7654
Tel: +27 21 864 5200

P.O. Box 652, Cape Town, 8000
Highbury Road, Mowbray
Tel: +27 21 680 1500

FACULTY OF EDUCATION

On the 27th of July 2021 the Chairperson of the Faculty of Education Ethics Committee of the Cape Peninsula University of Technology granted ethics approval **(EFEC 2-8/2021)** to B Mullins for research activities related to a M. Ed degree.

Title:	Teachers' understandings of performance appraisals in a collaboration school in the Western Cape

Comments:

The EFEC unconditionally grants ethical clearance for this study. This clearance is valid until 31st December 2024. Permission is granted to conduct research within the Faculty of Education only. Research activities are restricted to those details in the research project as outlined by the Ethics application. Any changes wrought to the described study must be reported to the Ethics committee immediately.

Livingston

Date: 9th of September 2021

Dr Candice Livingston

Research coordinator (Wellington) and Chair of the Education Faculty Ethics committee

Faculty of Education

Appendix B: WCED Research Approval Letter

Western Cape Government
Education

Directorate: Research

meshack.kanzi@westerncape.gov.za
Tel: +27 021 467 2350
Fax: 086 590 2282
Private Bag x9114, Cape Town, 8000
wced.wcape.gov.za

REFERENCE: 20211026-7029
ENQUIRIES: Mr M Kanzi

Mrs Bridget-Ann Mullins
23 Suffolk Road
Lakeside
7945

Dear Mrs Bridget-Ann Mullins,

RESEARCH PROPOSAL: TEACHERS' UNDERSTANDINGS OF PERFORMANCE APPRAISALS IN A COLLABORATION SCHOOL IN THE WESTERN CAPE.

Your application to conduct the above-mentioned research in schools in the Western Cape has been approved subject to the following conditions:

1. Principals, educators and learners are under no obligation to assist you in your investigation.
2. Principals, educators, learners and schools should not be identifiable in any way from the results of the investigation.
3. You make all the arrangements concerning your investigation.
4. Educators' programmes are not to be interrupted.
5. The Study is to be conducted from **02 November 2021 till 30 September 2022.**
6. No research can be conducted during the fourth term as schools are preparing and finalizing syllabi for examinations (October to December).
7. Should you wish to extend the period of your survey, please contact Mr M Kanzi at the contact numbers above quoting the reference number.
8. A photocopy of this letter is submitted to the principal where the intended research is to be conducted.
9. Your research will be limited to the list of schools as forwarded to the Western Cape Education Department.
10. A brief summary of the content, findings and recommendations is provided to the Director: Research Services.
11. The Department receives a copy of the completed report/dissertation/thesis addressed to:

> **The Director: Research Services**
> **Western Cape Education Department**
> **Private Bag X9114**
> **CAPE TOWN**
> **8000**

We wish you success in your research.

Kind regards,
Meshack Kanzi
Directorate: Research
DATE: 2 November 2021

Lower Parliament Street, Cape Town, 8001
tel: +27 21 467 9272   fax: 0865902282
Safe Schools: 0800 45 46 47

Private Bag X9114, Cape Town, 8000
Employment and salary enquiries: 0861 92 33 22
www.westerncape.gov.za

152

Appendix C: Sample Letter to School/Educators

Sample: letter sent to WCED/Schools/Educator
9 Timmerman Street,
Parow
7500

Dear Principal,

Re: request for your participation in a research study related to 'Teacher Appraisal in Collaboration Schools in Western Cape.'

I hereby cordially invite you to participate in a research study being conducted on teacher governance and performance management in Collaboration Schools in the Western Cape. The research fits into a larger study being directed by the Centre for International Teacher Education (CITE) at the Cape Peninsula University of Technology (CPUT) which includes professional development and Donor Schools across South Africa.

The project intends to build knowledge to inform educational research, policy and practice and how this affects teachers' work experiences. The primary aim of my research is to understand teacher's experiences of performance appraisal in Collaboration Schools.

Specifically, the study objectives are:

- To investigate teachers experiences of performance appraisal in collaboration schools
- To understand the effects the performance appraisal has on teacher motivation and performance in collaboration schools.

Your participation in this research would be greatly appreciated and is critical in assisting my understanding of the collaboration school new and innovative education reform approaches aimed at improving education quality in South Africa.

Through the Centre for International Teacher Education (CITE) this acquired knowledge and understanding will add great value to education providers, policy-makers and other researchers.

Your participation will take the form of an interview to discuss your experiences around Kraaifontein Schools' governance and specifically the appraisal system. The interview will be approximately an hour in length and be semi-structured. The interview will be recorded for my transcription purposes only. An outline of the interview schedule will be sent to you beforehand. I further ask if you are willing to share any documentation that you feel could help the study.

Thank you for your time.

Kind Regards,

Bridget-ann Mullins
0837192651 / Bridgetannmullins@gmail.com

Appendix D: Participant Information Letter

South African Research Chair in Teacher Education

Centre for International Teacher Education (CITE)

INFORMATION SHEET

Dear Research Participant,

You are invited to participate in a research study being conducted by the Centre for International Teacher Education (CITE), Cape Peninsula University of Technology (CPUT), on teacher professional development and teacher appraisal in Collaboration and Donor Schools of the Western Cape province. The objective is to build knowledge, and inform educational research, policy and practice in such schools.

You are invited to participate in this study because you are a part of Collaboration or a Donor School of the Western Cape.

This information sheet will help you decide if you would like to participate in this research project. Please read the document carefully before agreeing to take part in the study. Please participate only if you are completely satisfied with all aspects of the project.

TITLE OF THE RESEARCH PROJECT

Understanding Teachers within the Collaboration Schools Model in South Africa

WHAT THE STUDY IS ABOUT

The Western Cape government introduced Collaboration and Donor Schools in 2016 in the Western Cape province as a mode of Educational Public-Private Partnership (e-PPP). The purpose of such public schools is to improve the quality of the education system. Our research will study teacher appraisal and teacher professional development in such schools. The goal of the study is to amplify teachers' voice, development needs and involvement in educational decision-making because we consider them to be critical and necessary conditions for building equitable and quality education systems.

WHAT YOU WILL BE REQUIRED TO DO IN THE STUDY

As a participant in a Collaboration or a Donor School, you are invited to participate in an interview. Please indicate if you consent to participate in an interview.

PERSONAL RISK, DISCOMFORT OR INCONVENIENCE

The study involves no foreseeable physical discomfort or inconvenience to you.

CPUT, Education Campus, Room 2.45, Highbury Road, Mowbray, Cape Town, 7700
T: +27 21 959 5833/2
E: sayed.cite@gmail.com/sayedy@cput.ac.za

POTENTIAL BENEFITS OF THE STUDY

Your participation in this study will be invaluable in generating knowledge and scholarship about teacher appraisal and professional development in Collaboration and Donor schools. Specifically, your participation will:

i) inform practices in Collaboration and Donor schools to enhance teacher professional development;

ii) promote critical dialogue between teachers, stakeholders and policy makers;

iii) contribute to the Western Cape government's commitment to equitable and quality education for all.

YOUR RIGHTS AS A PARTICIPANT IN THIS STUDY

Your participation in this study is entirely voluntary. You have a right to refuse to participate in this study and you are also free to withdraw at any stage, even if you decide to answer the survey questions at this point. All you have to do is to inform us (see our contact information below). You do not have to provide any reason for withdrawal. Your decision to take part or not to take part in the study, or your decision to withdraw later, will not invite any penalty or future.

HOW YOUR CONFIDENTIALITY AND ANONYMITY WILL BE ENSURED IN THE STUDY

This research has been approved by the Ethics Committee of Cape Peninsula University. All data obtained during the course of this study will be kept strictly confidential and safely stored. If you have further questions about this study, please contact any of the following persons:

1. Prof. Yusuf Sayed

South African Research Chair in Teacher Education

Principal Investigator

Email address: sayed.cite@gmail.com

2. Dr. Marcina Singh De-Vaal

Research Fellow

Email address: singhm@cput.ac.za

3. Mrs Bridget-ann Mullins

Research assistant/student

Email address: bridgetannmullins@gmail.com

Appendix E: Participant Sample of Consent Form

Faculty of Education Ethics Informed consent form

CONSENT TO PARTICIPATE IN A RESEARCH STUDY

Category of Participants (tick as appropriate)

Principals	x	Teachers	x	Subject Advisor		District Official		Other	
Other Specify		School operating partner							

You are kindly invited to participate in a research study being conducted by the Centre of International Education (CITE) at the Cape Peninsula University of Technology. The finding of this study will contribute towards:

- A Master's Thesis
- A journal article for publication as the CPUT Masters in Education requirement

The information below gives details about the study to assist in the decision of participation

Title of the Research:

Teachers' understandings of performance appraisals in a collaboration school in the Western Cape.

Overview of the Study

Private-public partnership (PPP) can be defined as the cooperative agreement between the private and public sectors to collaborate to provide infrastructure and or service delivery to public institutions. In South Africa, the newly formed Western Cape Provincial legislation around Collaboration Schools allow for a demarcated form of PPP in education to exist. A Collaboration school is a struggling public school that the Western Cape Education Department (WCED) has contracted out for governance and management through an NPO called a School Operating Partner (SOP).

The primary aim of the research is to understand teacher's experiences of performance appraisal in Collaboration Schools. This is important as teachers are the frontline implementers of such schooling reforms yet the area of teacher governance in collaboration schools is currently under-researched. With this in mind, the research objectives are to unpack how teachers in Collaboration Schools experience the new governance system particularly around performance appraisal and the effect this has on the teachers.

Specifically, the study objectives are:

- To investigate teachers experiences of performance appraisal in collaboration schools

- To understand the effects the performance appraisal has on teacher motivation and performance in collaboration schools.

Procedure

The researcher will request an interview from participants to talk about their experiences, particularly around appraisal systems. The interview will be approximately an hour in length and be semi-structured. The interview will be recorded for the researcher's transcription purposes only. An outline of the interview schedule will be sent to participants beforehand. Participants will be asked if they are willing to share any documentation they feel could help the study. No incentives will be involved in the data collection or interview process.

Voluntary/Right to withdraw

Participation in this study is completely voluntary. No one will be forced or required to participate. There will not be any form of discrimination against anyone as a result of participation or non-participation. Participants will receive a transcription of their interviews for approval. Furthermore, participants can withdraw from participation at any time before the completion and finalisation of the study in 2021.

Confidentiality and anonymity

To ensure confidentially and anomaly only pseudonyms will be used and all identity markers will be removed from any documents including context markers such are school details. The researcher will strive to do no harm and the participants will be treated with respect at all times. The researcher will ensure that data will be stored in a safe location that is alarmed and secure. All electronic files will be password protected through several access points.

Potential Risks

There are no adverse risks in participating in the study. All participants will be kept anonymous, and no identity markers will be included in the study report. However, participants may feel discomfort or challenges with some of the questions and their answers. The researcher will strive to work within a time that participants are available.

When the study is complete all data that is no longer needed with be deleted and all identity forms destroyed.

Kindly complete the table below to agree to volunteer for this study.

Tick the appropriate column		
Statement	**Yes**	**No**
1. I understand the purpose of the research		
2. I understand what the research requires of me		
3. I volunteer to take part in the research		

4. I know that I can withdraw at any time before completion of the study		
5. I understand that there will not be any form of discrimination against me as a result of my participation or non-participation		
6. Any comments:		

Participant:

Name:	
Age:	Race:
Gender:	Position:
Employer:	
Signature of Participant:	Date:

Please provide your name and sign the consent form. You will be given a copy of this form on request. Please note – your name or any identification marker will not be included in the final thesis document or any reports. This is purely for ethical and consent considerations. You will remain anonymous for the research study.

Researcher:

Name: Bridget-ann Mullins	
Contact Details: 0837192651 bridgetannmullins@gmail.com	Date:

TEACHERS' UNDERSTANDINGS OF PERFORMANCE APPRAISALS IN A COLLABORATION SCHOOL IN THE WESTERN CAPE.

2021

Interview Schedule: Teacher Interview Schedule

Interview Schedule Code:

Meta Data

Interviewer:

Institution/Organisation:

Date of Interview:

Time of Interview:

Recording Device:

Language of Interview:

Gender of Interviewee:

Race of Interviewee:

This instrument is used to interview a teacher employed at a North High collaboration school with the aim of soliciting their views about school governance, the school environment and the school performance management systems. The responses will be used to gain insight into public-private partnership school models, with a specific focus on its effect on the governance of teachers.

BIOGRAPHICAL INFORMATION
1) Tell me a bit about why you became a teacher and the journey that brought you to this school today.
2) So tell me what do you do at this school?
     I.   How long have you been teaching here?
     II.   Is it a WCED or SGB post? If SGB, elaborate on the recruitment process.
     III.   Can you talk me through a normal school day?
             i.   In what ways are the days at this school different or the same as ordinary school?

TEACHER PERFORMANCE MANAGEMENT SYSTEM

In SA most teachers know the Integrated Quality Management System (IQMS) and/or the new QMS as the performance appraisal system used for schools and teachers. Sometimes collaboration schools use additional methods to evaluate teachers, perhaps not as formally so please keep this in mind as we go through the evaluation questions and discuss your thoughts on the teacher evaluation process. North High also focuses on and uses data Driven processes to inform teaching to monitor and evaluate teaching practices. Therefore, in this interview please make reference to both as well as any other aspects you may feel are used when evaluating you and other teachers in this school.

In this interview, I use the phrases teacher performance appraisal, performance review and evaluation interchangeably.

4) Do you believe that teacher performance evaluation is important and why?

> Prompt for: Difference between developmental & control

5) Prior to undergoing your IQMS or a performance evaluation at this school; were you given any information about what to expect? Please share what happened and your thoughts on this. (How were you introduced to the IQMS/your review process?)

> Prompt for: mentoring, training, resources, evaluator collaboration, explanations,
>
> Feelings, confidence, understanding

- *What about when you had to do your first Data Analysis and report?*

6) Let's talk a bit about the teacher evaluation criteria (what aspects are used to evaluate you). Do you think the criteria used in the evaluation align with the needs and goals of a) the teachers, b) the students and c) the school?

7) Let's look at the data-driven aspects? Tell what all it involves, what process you have to go through and how it made you feel.

I. How are the student's marks, input and results used to review or impact your teaching?
II. If classes are performing well or poorly, who looks at this? Does it get spoken about with the teacher? What occurs if students' results are declining?

7) Tell me about your most recent performance review. What did it involve, what was the process that took place and how did it make you feel?

> Prompt for: when, how often, and who involved along the way
> Systems used: IQMS/other

I. What was the classroom observation like, please describe it to me.
II. Did you get the opportunity to observe someone else class? Tell me about it, did you enjoy it, what are your thoughts on its impact? (probe for learning from others, sharing, connecting with colleagues)

8) Tell me about your last feedback session where the outcomes of your review were communicated to you. Describe the setting and how you felt.

      I.   Did the feedback cause you to reflect or make any decision on your personal development and/ or your professional development? (Why not)
              - What factors would you say influence decisions you make around your personal and professional development?

      II.   How did your feedback session affect your employment and, how did it affect your confidence/motivation?

9) Would you say your last performance review (IQMS and Data Analysis) had an impact on your teaching or work at all? How or Why?

10) What would you say are the main challenges the school faces with the current teacher evaluation system (Prompt: Stressful, fair, taken seriously, trained vs biased evaluators)

11) So the school has all this information after the review process (Data driver or the IMQS) let's talk a bit about how the school uses this information. What do you think the school does with the performance review information?

      I.   Is it used for decisions about promotions and dismissal and do you think it should be?
      II.   Is the information used to make decisions around the general training and development needs of the staff cohort and the individual teachers? (Should these then be compulsory for teachers to attend?
      III.   What happens to teachers who underperform during an evaluation? What do you believe should happen to them? Have you come across this in this school?
              - Prompt for informal evaluations such as very poor grades or poor classroom discipline?

12) What are the benefits of the performance review for a) teachers b) the learners and c) does it contribute to the effectiveness of the school? How?

13) What would you change about the current performance management system if you could?

<div align="right">(first possible ending point)</div>

CONTINUOUS PROFESSIONAL TEACHER DEVELOPMENT

16) What are your personal or professional reasons for attending CPTD?

    a. Do you collect SACE points?

17) How are teachers made aware of CPTD programmes/ activities at the school?

    a. What is the form of CPTD in your schools (Prompt for provider, mode, focus and form of CPTD) Who provides the CPTD at your school and what kinds of activities do you participate in?

    b. What is the main focus of the CPTD that you receive? Prompt for content

    c. How often do you undergo CPTD?

d. Do you have a quarterly/ annual CPTD schedule or are the activities arranged in an ad-hoc manner?

18) How are the developmental needs of teachers at the school identified?

19) Have you received any coaching/facilitation through the SOP at your school? If applicable, please explain.

20) What in your view are the benefits or the effects of CPTD on teachers, learners, and the schools?

21) In what ways has the provision of CPTD changed as a result of the pandemic?

(Second possible ending point)

GENERAL

22) What are your views on the collaboration school model in terms of feasibility in South Africa?

23) Would you like to share anything else with me or discuss anything further or have any questions?

EXPERIENCES OF TEACHING AT A COLLABORATION SCHOOL AND THE ENVIRONMENT'

14) Tell me about your experiences of teaching at a Collaboration/Donor-funded school?
     (Prompt for Efficiency, administration, planning, resources, teaching and learning), and how is it different to an ordinary public school.

15) *(Explaining that school environment is around the relationship, resources, feel, values and the manner in which conflict is dealt with).*

How would you describe the school environment in relation to:
     - the relationship between teachers
     - the relationship between teachers and SMT
     - the relationship between teachers and SOP
     - are the views of teachers seriously considered
     - to teachers have the autonomy to manage their own classroom as they choose
                                    END

Appendix G: Example of Transcribed Interview of Teacher HOD participant

Bridget: And then at least hopefully will give me some some background noise and then use this and I just also check my settings alone before we go on just in case it's something simple that'll make a nice OK speak for me same now same very very, very soft that's um, we'll make a plan … Z:, thank you so much for for agreeing to, to be interviewed. And taking the time just to chat to me. I'm so sorry about this weekend and a little bit strangely, now again, but we'll see what we can do.

And ya, so you did have a consent form that was signed quite a while ago in the very first staff meeting so that just and you are aware that we've been recorded, and the outcomes and transcriptions will be sent to you it is highly confidential or identity markers will be removed. And you will just be data in a bigger system. So nothing will ever feed back to you in terms of that. And you are able to attract within this your store, if you would like to attract your data from the process. Okay, so you're welcome to let me know about that. And then ya, it's just in a part of my master's research that I'm going to ask you a couple of questions, it is a semi structured interview, so we're just going to talk hopefully you more than me. And then although as you know, it is around collaboration, schools North being part of that, you'll actually see that a lot of my research and the questions, as you might remember from the survey, were actually quite a lot about what our teachers experiences in the schools around performance appraisal and kind of the work that is done in terms of evaluating the teachers performance and their work. And then also around continuous professional development. So we're utilizing those two areas to kind of look at the teachers experiences in the school. So it's not really so much around the high level policies of collaboration schools, but obviously, that work that feeds into that. um, so without further ado,

 I know that in South Africa and was in the efforts in your school that the integrated quality management system was used, and now that's also shifting into the QMS. So you've probably had a little bit of training on that. And I see North has does utilize this method, although I know that COVID-19 has been quite a bit of a spanner in the works on that. And but I also see that North high school, I had quite a strong data inform the teaching practice. And it's also utilized to see how teachers are teaching and form opinions on their teaching practice from the data analysis as well. So when I speak to you today, and I speak about performance appraisal review and evaluation, and those terms are used interchangeably, so it could be appraisal, review or evaluation, they all mean the same thing when I speak to you about that; And you answer you can refer to either IQMS, or you can refer to the data the data system because both are actually utilized to form opinions on teachers in the school and their feeding, teaching and learning practices.

B: So let's start with you know, a little bit get the journey going. So let's talk a little bit about why you became a teacher and what led you to, to teaching and North High school.

Z: Well my background had not always been in education per say, I have a background in Bio Science degree and I could not find a job in that. So I went into retail – I did retail for 7 years after studying, and while I was in retail I worked my way up from the floor into a management position, this gave me a little bit of insight into working in management systems, accounting and data keeping and I got my foot into a local school and I became their bursar. While I was the bursar the Principal actually saw that I had a science degree and her husband was a lecturer at UWC and they put me into contact from there and I did my PGCE and I sort of by co incidence that way. So I have been in education now about 15 years.

B: Gosh so that was quiet a long way of doing it, not quite as clear cut as others but that is really great. And how long have you been teaching in total and then also at NHS?

Z: so in total I would say 13 year and before that I actually taught English first additional language at the same school I was being a bursar as well, I did that on and off for about two years as well. And I have been at NHS nearly two years now.

B: Nearly 2 years ok great. Cool that is stunning. Ok cool. And I know that - weird. Okay. So do you believe that teacher performance evaluation is important and why?

Z:I do believe it is important um it is the only way you can see where you started, um it is sort of like a road map that is how I view it, um, you can see where you going to as well. So it gives you information about where you are on your journey. As an educator um I believe that professional development is something that is not specific to education it is something that needs to be implemented across all system otherwise you just stagnate and as teacher these days we cannot afford to stagnate. It's just moving in a really tough space . Um, these are times when our learners are forced onto this mission, don't have schools and all the things surrounding that as well and we need to be able to keep up with them and encourage them and push them to go the extra mile. If we don't do performance management there is no way we can actually measure where are we on par with technology, and IR how do we motivate the learners you know through motivating ourselves as well.

Bridget 9:25 so you see teacher performance evaluation or appraisal as quiet developmental

Z- Definitely – it is very developmental, I know a lot of people will feel it differently. But I feel quite strongly about you know, teaching performance and you know how we grow as a teacher from year to year, we cant be doing the same thing for 25 years and say I've been a teacher for so long when you yourself have not learnt anything.

Bridget 9:52 Yeah, that's one way of looking at it – that you are a teacher but you yourself haven't learnt anything. That's definitely one way of looking at it. Okay, so prior to going through your IQMS or your first data review process at NHS, were you given any background information or a kind of an introduction to what would what would be happening? And if so, can you tell me a bit about it both in terms of both of those processes? What are how are you told about it and introduced to it?

Z- It wasn't a very in-depth process, especially with COVID which I sort of understand. Um there was a brief email that explained what the process was going to be, the process included choosing your peers, it briefly went through was the evaluation process, and then what was expected after we went evaluation, the sitting down with peers and then finalizing scores. But like I said, everything was included in one email. And I think there was an expectation that I would have some background on the IQMS system, because I've been in education. So it wasn't an immense document that we had to read.

Bridget-ann Mullins 11:17 Okay. And in terms of the data review process, you know, you've got to kind of look at your marks at the end of every term and give a report on that. Were you kind of was it explained to you why and what is needed? Somebody sit down with you about that?

Z- Um Last year and 2020, there was only one process that follows that there was only one review. It is it's not as I expected it to be. So I do feel that there are some gaps that we could fill up as a

management team when it comes to performance reviews as well so that it does not become a once off process and it becomes slightly more developmental

Bridget-ann Mullins 12:01 Yeah. Because that means a lot to you. You like the developmental?

Z- The scores right now are not developmental – they are sort of once off you are scored for the year. It is not quite something I agree with.

Bridget Yeah. Okay, cool. Let's talk a little bit about the criteria that's used both on the IQMS, and then also what they expecting from the data as well, your data driven processes and your outcomes. Do you feel that that the criteria are aligning with the needs of you personally as a teacher, but also in terms of your school and your students you know,what they using to evaluate you on.

Z- Do you feel that most of the criteria is actually what we have to do, basically, of teaching, what I do feel is that it doesn't really show teachers where they can extend themselves actual excellence in teaching and education. With this being my first two years of a head of department in South Africa, it hasn't, the document itself hasn't really lent itself to showing me the areas where I could actually focus on and strengthen my current position. So it does.

Bridget-ann Mullins 13:37 Frozen PCBs? back as you said, it doesn't meet the basic needs.

Z-Yes

B:Cool. And how are students input and achievements used in evaluating processes for the school?

Z- Currently, what we have been doing, I sort of sit and I put together all the data that every educator and every learning area in school. And this is why we discussed, like this afternoon we are having a discussion, as full stuff. So what we'll be doing, we'll be monitoring and having a look at what we did in term three. And we'll compare that to the monitoring. So far, we haven't specifically pin pointed that to a teacher, and I don't know if it is something that we are going to do in future. It has helped us inform where we see the little bits and pieces that are missing. So we've been discussing the possibility of moving teachers based on what we've seen and results that are coming back.

Bridget-ann Mullins 15:04 Moving teachers where like into different grades, different areas of work?

Z:Yes int. o different grades and areas for work as well.

B- And this is the conversation that happens with the teacher.

A - Currently, it's being discussed at SMT level, but it will be discussed with the teacher, as well. Because as far as possible, we would also try and try and meet the teachers needs and wants and specifically within the learning area as well.

Bridget-ann Mullins 15:41 Okays. So in a way, if you have a poorly performing teacher, and you've noticing some gaps, and there isn't improvement in in the grades, you know, she's not, they're not managing to shift those marks up. One of the process that's coming out of that, in terms of poor performance, is a conversation around shifting the teacher into different learning areas or, or grades. (Yes) So that's (that is correct) . Ya. And before you get to that process is the other aspects that happen

with the teacher are they trained? Does Mr. Grove speak to them? Or you speak to them to say, look, try X, Y, Z? Or is it? Is there an in between thing that I've missed?

Z- For the most part , this year, I sort of had a look at how to assist teacher to actually increase grades. We've had a couple of training sessions, we've looked at utilizing things like Bloom's Taxonomy, we've looked at how to set up question papers, questioning techniques in the classroom, that can be you know, spread out across the different types of question papers. We've done some training on cognitive levels, just how to build that into teaching skills, and then following through into questioning as well on question paper. Unfortunately, we haven't had a lot of contact with curriculum or subject advisors this year. So there hasn't been a lot of training from that side, except for the training received for the revised ATP for the year. And how to utilize those. There hasn't really been much training on, you know a lot of, no real focus on teacher improvement and how to get teacher out of the slump that they are in.

Bridget-ann Mullins 17:37 Okay, that does make sense. At least it sounds like some training, it takes place. And then, you know, if you're still at that process where shifts aren't happening, what else can we do? You know, so that I mean, that makes perfect, perfect sense. Okay, cool. And tell me about your most recent IQMS or your most recent data review process of your class? And what did it involve? And how did it make you feel?

Z: Well, this year, we sort of transitioning from IQMS to QMS already, I don't know, we were just supposed to give ourselves a score. And that was sent through to the DSG. And that was the beginning and the end of the process as well. So I'm not quite sure how fruitful that process would be. For me, it was just a it felt like a ticking exercise. (Yeah). So yeah, there's no real outcomes when it comes to that. So get out and see what work you have to put in. And you don't really see the benefit of that. When it comes to learners and following up on what they've been doing. I think for myself, I've put in a little bit more work. Because I sit with the data analysis of each and every learner for grade 8 and grade 9. (mmm). What I could actually do is, just have a look at an overall view of the learner. And actually the learners at risk, I would just pull up to my table because I teach most of the grade 9s. So those who I teach, those are the ones that I can actually reach out to, um just pull them up and have a brief chat with them and things like that. We're just hoping to see a bit of impact. Having a look at the data to see that's brought about any changes. And currently we've identified grade 10 and Grade 8 learners who are at risk, and we are doing the grade nines tomorrow. And hopefully by next week, Tuesday, we have scheduled the meeting with parents of learners at risk to actually just you know, inform them of what's going on. Show them the current data we have and you know, just put in all those structures.

Bridget-ann Mullins 19:52 Yeah, well, that's great that you actually you know, you have all the data that gives you that information and that you can call the parents in and say, Look, you know, your kid is at risk of failing. This is why we're not we sucking it out our thumb. Um speak to me a little bit about the intervention process that you put into place for these learners at risk.

Z- So every department does, every department has worked on their subject improvement plan, and according to the subject improvement plan, every teacher has been contributed to the intervention plan. So interventions, firstly, we look at learners who haven't handed in assignments, and we have given them a deadline as to when you know, we would expect either one, two or three assignments to be handed in. And we are trying to do to fill up all those gaps as well. When it comes to failing learners, intervention includes extra classes, and specifically with maths because it's the focus point. - So every department does, every department has worked on their subject improvement plan, and according to

the subject improvement plan, every teacher has been contributed to the intervention plan., that's run according to the subjects and learners who are behind in the subject.

Bridget-ann Mullins 21:15 Okay, cool. That's great. And I mean, that all that information can then obviously be shared back to the parent as well. And you saying like, look, we are utilizing the data. To get that back to the teachers? Do you? Do you think the teachers and yourself, do you feel that the the data driven process for evaluation of, of the teaching and learning is stressful?

Z- I think it is quite stressful, especially for the teacher, because the students performance is going to be linked to your performance. And I've feel that that is not a true reflection of what the teachers capabilities actually are. Sometimes you just have a low performing cohort or a low performing class, and that reflects badly on the teacher as well. So it is quiet stressful for a teacher to see that, you know like, especially this afternoon, and I've seen it before when we have had some of the meetings when the marks for example for Maths goes up in grade 10 and you have a 24% pass rate for the entire cohort. We know you've got really good teachers in place, you know what it is that they're doing, they employing the strategies they have after school classes, but they're not really seeing a big change in the learner results. That becomes quite disheartening as well.

Bridget-ann Mullins 22:43 well. Okay, can imagine. Yeah. And in terms of your feedback when your data is put up there, I mean, because I know that IQMS, data not put up there, but in terms of if your data put up there and now this is your feedback session, right?. So your data goes up on your class, and although you're not, saying this is Z: class, you know, you all know who teaches grade XYZ 10 a maths or whatever, or science. Do you do you think that, are you aware number one- that it's going to be your data is going to be communicated in the session? Because it sounds like they're all open sessions at the data is put up?

Z- Okay. So every teacher is aware that we have these sessions, at least once a term (okay). So we also ask the teachers to work with their own data. (okay) on a term to term basis. So they also sit and analyze the data and that information goes into the teachers file, where as I sit and, and I do the evaluation for the entire school, per subject as well. So I think it's open book policy as well. So the teacher is aware of what the learners levels are, what there comparative data looks like per term

Bridget-ann Mullins 24:04 And does that feedback personally looking at you know, not the general teachers, that feedback personally reflect on any decisions that you've made around your development and your teaching and learning?

Z- Not specifically, no, it more reflects on the school improvement plan where the school has decided that they would like to go into the data driven direction. So yeah, so it's not really something that I would do personally, it's something that I enjoy doing. I like to see what my weak areas are and my strong areas are and how I can, you know, to sort of compromise between the two as well. So for me, it's something that I've been doing in the last, say, seven or eight years of teaching, looking at my data and tracking through like that. It's something I don't mind personally.

Bridget-ann Mullins 24:57 Okay, so you don't you don't mind it and it does it actually impacting on how you approach your subject? Because you would then…

Z- Yeah. You know, you would get to see one of the strongest points of your learners is because obviously, you know, some of the work varies in difficulty. So it also gives me an idea of how I need to approach the difficult topics, and how I can level my teaching and my classes.

Bridget-ann Mullins 25:27 And then any was any feedback on the IQMS? That you've done? I know COVID impacted, but any feedback on IQMS the last two years?

Z -Absolutely none.

Bridget- Ok Would you say? I'm going to I'm going to split the question into two, would you say that the data driven process that you look at and how that impacts on your teaching and learning does it impact your confidence and your motivation at all?

Z- I would say there are times when confidence and motivation definitely takes a knock. Personally, I know that I do put quite a bit of effort into classes into finding, you know, resources that is appropriate for their learning levels and trying to extend them and make little learning packs. I've got after school classes. But it doesn't really show in my learner results. So there are times when my confidence does taken a knock. But then it also forces me to go back to the drawing board. And just to assess, you know, what worked, what didn't work, what can I do going forward.

Bridget-ann Mullins 26:35 So you almost take, you've got a good resilience, basically, personally, because you take those knocks, and you utilize it to then motivate yourself to kind of find other ways. speaks about you being a brilliant teacher? Yeah. And what would you say the main challenges that the school faces around the current teacher evaluation system, for the school main challenges for the school?

Z- I think mainly, first of all, COVID has been a big factor in it. So that that's one of the main things. We also don't have enough hands on deck when it comes to, to helping the teachers develop. Just personally, I have spoken to the principal about the possibility of me sitting in a little bit more in the teachers classrooms, because we have so many teachers that are new to the education process, you need those, you know that, that hand, hands on guidance, and just, you know, just a little nudge, maybe direction for what actually taking it is something that I used to do when I spent time in the Middle East. So part of my coordinator training was to actually go into teachers classrooms, and assist them with teaching and learning processes. Unfortunately, it's with time constraints, it's not something that we could actually do. I have a full schedule, alongside being sort of the trainer, hands on curriculum coordinator, I look at data and every think else above. So I think that's kind of thrown a spanner into the works. And the same with the principal and deputy principal – its time constraints.

Bridget-ann Mullins 28:28 Yeah. Okay, you've spoken a little bit about this, and I'm going to probe it some more. So the school has all this information, they've got basically two sets of information that they're using to evaluate teachers, they've got the IQMS, which you've now sent to your HODs and off to your your circuits, and which they have the data of, and they've also got all this data driven data, which you are sitting a lot with as well and help evaluate. What other ways does the school use this information? How do you think the school is using this information? What does it do with the information that's that's a now you've mentioned, a bit of the feedback sessions, but is there anything else you'd like to share around what the information is utilized for?

Z- So we use the information within our departmental meetings as well. We try build on what gaps we can actually pick up when we discuss it in our open group sessions. So after the open group session this week, we have later in the week, we've got a subject meeting that is scheduled after the broad departmental meetings. So we'll take the feedback from today's meeting, we'll go into the departmental meetings, and what we would ideally like to do is actually start formulating a subject improvement plan, for term one for next year. With the goal of the subject Improvement Plan feeding into the school improvement plan.

Bridget-ann Mullins 30:07 Okay, now that makes sense. So that you, you know, you together working on identifying, those gaps. And so it does obviously impact in on the teacher learning in the subject. Will it impact anything on the decisions around general training and development of the staff?

Z- It definitely will. And that is how we came to actually putting down on paper, what the training needs of the staff where. Last year it was recognized that there wasn't quite as many levelled questions within the question papers, which is why we decided on doing training on cognitive levels and so forth. So, what will take a lot of what is being said now into consideration we'll do, well the SMT mainly, we'll do a full year's analysis, and that will give us the grounds for what training and participation we need to get from the teachers for next year.

Bridget-ann Mullins 31:07 For next year. Stunning. That sounds like a nice, a nice way forward. And what do you think are the benefits of this performance analysis? How does it contribute to the effectiveness of the school?

Z- I think it gives us a bit of a roadmap to where we actually going to, I've actually seen how it's helped us to define our focus, our primary focus two years ago, and even prior to that, before I joined, the school wanted to be a primarily science and math focused school. But when we had a deep dive into the results of our current cohorts that we have, and we looked at those specific subjects, we found that those were not subjects that we could actually then, you know, build our foundations on. And that helped us and helped us to shift our focus into more of a agricultural technological type school. So that's where we're heading towards. So I think we're using the data to actually just keep us focused to keep us on track. And also by using the data them in trying to push through more resources and development into those teachers and into the learner.

Bridget-ann Mullins 32:26 Amazing. Gosh, so what would you change about the current performance management system, if you if you could, now you've kind of looking at two, you've got the data and the IQMS you can speak to both I'm sure there's little shifts in both.

Z- I think for performance management on a teacher level, I would start out sort of at the beginning of the year, the first couple of days, just having a quick look back at where we were at the end of term4 the previous year, and So and then, like I said, we would like to put into place the subject improvement plan. But I think feeding into that you also need at the beginning of the year a teacher improvement plan, where a teacher can just, you know, set out this roadmap for the year, what were their shortcomings, what were their strengths? And then a couple of things into place to actually speak to those shortcomings during the year. Which is something that I havent seen happening.

Bridget-ann Mullins 33:25 Yeah. I mean, you've got the personal development plan, but you almost saying have something that is more open, a teacher improvement plan that is open, because your personal development time is quite personal, you know, it's kind of maybe sharing that?

Z- Yes. But as a team of teachers, because we work and have this relation with each other, we need to have a common goal as well. And then it also helps us to further identify what training needs, our staff is going to require. Because my needs as a science teacher is not going to be the same meanings as a language teacher.

Bridget-ann Mullins 34:02 Yes. Yeah. nuances as to subject specific. Yeah. Okay.

Z- Exactly so if we have something like that at the beginning of the year, then, you know, the teachers personally also has a roadmap for themselves, and the school and it helps us just to develop the school for the remainder of the year. So that needs to be an ongoing process. Yeah, cant just be a once off. Let me have a look at it in January, and then I'll have a look at it in October (mmm) when the QMS rolls around (Yeah).

Bridget So you would look at integrating the QMS into this as well. So it's almost an extension of the QMS utilizing the data.

   A- Exactly,
Bridget Because the two could work actually together and the moment they kind of working next to each other's

Z- Yes because you could just tweak the QMS is process. Well just timeline, not the process. Just the timeline ever so slightly. So it becomes more developmental and not just a ticking off process.

Bridget-ann Mullins 35:05 That makes perfect sense. I'm going to ask you a little bit now about your experience of teaching at a collaboration school. And then the last section of my questions, if we still have time, we'll be on a little bit more on the continuous professional development. But I'm going to ask you a little bit of information about your experiences. So you can start off by just telling me what are your experiences of teaching? How would you describe your teaching, you're talking about teaching at a collaboration school? What would you say anything?

Z- It's been a bit underwhelming, (okay). When I signed up for collaboration school, really passionate about making a change in the lives of learners. And that was my ideal. In the past two years, I feel like I've been an ordinary teacher at an ordinary school, and that I have personally have not made much impact as yet. with the previous operating partner, unfortunately, there was a lot of fighting with in the group, and that negatively impact on our school, unfortunately. I had mentioned in a meeting that if felt like our current school was actually sort of a stepchild in the system, because we were the last to come on board, and they were punting all these wonderful things at other schools, and we were hearing about it but we here not seeing any of the implementation in our school. With a change of operating partner, I was very hopeful. But unfortunately, I haven't seen anything this year. The only thing they are currently offering that the operating partner has brough it is the triple the dashboard, which helps us a little bit more with data. But other than that, I personally have not seen an impact. I have work with impoverished schools as well in the Western Cape and it's pretty much the same. I haven't seen much of a difference.

Bridget-ann Mullins 37:20 That's unfortunate. But I believe there is talk about some things like the coaching in 2022. So hopefully, there's a little bit of a shift. But it is I mean, I can hear the frustration that's come into play when you you moved from SDF to PPS to Education Ally. You know and it's not like you just said, you kinda the baby's witnessing the parents, you know, and you are kind of like guys sort yourselves out.

Z- Ya we can do this as well, just give us the freedom, give us the info and give us the resources- we can do this.

Bridget-ann Mullins 38:00 you can do this. Yeah.

Z- That's one of the factors, and especially with when it comes to, I do believe that with the collaboration, especially with the SMT, that plays a big role in supporting the rest of the staff as well. I don't feel that there's been enough hands on training when it comes to the SMT to actually take the school to the next level. And it is very frustrating that three years down the line into being a collaboration school, we still working at this little baby steps level.

Bridget-ann Mullins 38:35 So if you had to say something you would want from your school operating partner is more solid SMT training so that you are able to own the mandate of taking the school forward in line with what their thinking is, as well. So, you know, work with that management structures that you have. That makes sense. Makes sense? Okay, cool. So, I'm going to ask you about the school environment. And when I say environments are kind of, I'm looking at the relationships between resources, the feelings, the values, the manner in which conflict is dealt with, you know, the kind of the culture of the school. So what would you say is the relationship and the environmental relationship between the teachers in the school

Z- It's a very difficult environment. At times. I don't feel that there's much collaboration between the teachers at the school it's more of a little group here and a group over the and there's not much overlap. There seems to be a dominant group of teachers and the unfortunate part is, the dominant group of teachers have a very negative mindset towards teaching. What makes us even more unfortunate is that it's a very young teachers with a negative mindset. I've actually I've sat back and I've noticed how they I have been influencing a lot of teachers that have been coming on board as well.

So that is a culture that myself and the deputy principal we have taken note of it. We've we've tried to you know, do a little bit of team building and things like that but there's a lot of resistance and there has been a lot of resistance since the time I've started. So they they're not really willing to listen to anyone besides principle. But it's they don't even listen to the principles just to give an example - school starts at eight and the first bell rings at quarter to eight and it's expected that all teachers be at the classrooms you know, trying to get the learners back into classes. No one goes to class at 745am, so everybody's standing around in some way chatting and laughing away. So it doesn't bode well.

Bridget That is unfortunate - you know that you have that shifting int place, particularly because often young teacher we want them to be the ones that hold the passion and bring the new energy. And what is the relationship between the teachers and the SMT?

Z: they could have a better connection. There is a lack of communication that comes for the top down where several things are lost in translation, which often leads to the staff feeling a lack of trust and unappreciated.

Bridget: It is great to have such a perspective and show you willing to take ownership of the matter, not just speak about the teachers. What do you think would help this situation?

Z: Thanks, I agree we all need to look at the parts we play. One thing that could help would be to have more transparency and direction in the school. The previous SOP had very little transparency. We did have a meeting with them to try and address this lack of transparency and find out what is their vision for the school, as well as what resources are available and what the financial situation is – however these meetings where fruitless. They seemed to come from a direction of you work for us, so don't question us. The current SOP seems a bit more hopeful, but unfortunately I haven't seen anything in 2021 that really speaks to them being much better. The new SOP have met with the SMT once but the staff do not know them

Bridget: That leads well into my next question, do the teachers feel they are linked to the SOP, their employer, in anyway? And if so how do they connect and get along with the SOP?

Z: The teachers are very vocal, particularly the younger staff and in our staff meetings. There is a staff rep on the SGB and the teacher can ask the staff rep to raise things at the SGB meetings on their behalf. But I feel the teachers voices are lost when the SOP has a 50% seating on the SGB, as they are basically controlling the SGB, which seems to listen to the SOP and not the other way around. Aspects of SGB matters are not being addressed and other stakeholders on the SGB are not given the space to be heard. For example the staff internally investigated salaries and it was shown that the salaries where not on-par with the WCED. But this was not properly address in the SGB meetings. Teachers also asked the SGB to please address the teaching load and a call for additional teachers was made. However, none of these matters where properly addressed and the teachers where not given feedback on them. Some movement around the salaries occurred but on an individual basis only. There was no formal feedback from the SGB or the rep communicating back to the teaching staff about matters that impact them. The previous SGB rep was a friend of mine, and told me in confidence that the SOP stated that no information was to be disseminated back to the teaching staff from items discussed in the SGB meetings; and I really don't think this is fair or a good call.

Bridget: I can only imagine that this sits very poorly with you as it contradicts what you have been speaking about before around your ideals, values and need for transparency. It seems the lack of transparency is causing some issues.

Would you say that teachers have the autonomy to teach what they would like and how they would like to teach in their own classrooms? Do the teachers take autonomy of their teaching and learning?

Z: I think if teachers took full autonomy for the student teaching and learning and ran the classrooms as they would like to, they would get into trouble. This is because the content, when something is taught and the way it should be taught, has to align with the WCED and the SOP. And both of those systems do not speak to each other. It would be a much better system if the WCED and the collaboration schools could sort out their policy issues and choose one system that the collaboration schools can then follow. Currently the double system is causing confusion and conflict amongst the staff who are trying to take autonomy for their own teaching and learning but are not able or allowed to do so. It is very stressful needing to operate in both systems. The WCED has their own policies that must be followed, but the SOP have created their own expectation and informal policies which are sometimes in direct conflict with the WCED policies. We are not managing to meet both the operating partners systems and the WCED systems which is causing conflict; so the teachers then don't feel like they have the necessary autonomy to make decisions around how best to manage their teaching and learning space

Bridget-ann Mullins: Uh,

Z: yeah. So I can say that I feel we are still constrained by policy and procedure, whereas WCD has set out a lot of policy, a lot of procedures that we do need to follow. Um, collaboration school comes in with expectations and not so much on policy and procedure. It's difficult to move away from what, set down on paper, actually follow what the, the people who pay your salary at the end of the day and the verbal instruction. So it's a very thin line.

[00:00:49] Bridget-ann Mullins: Cause I mean, although, although you, as you said, the SOP might not have, um, actual policies in place outlining an expectation creates an internal policy [00:01:00] regardless. Um, it creates a way that you have to operate in order to reach X. And if it's not in aligning with what the current policies are, there's going to be discord.

Z: That's exactly what's happening. Yes.

Z: Because, and then that's what it doesn't really give us a leg to stand on. When WCED comes into the school to assess what is happening. I just gauge where we at, because there's, this has been this internal verbal policy that this is what collaboration wants you to do. There is not really much backing we can get.

[00:01:43] Bridget-ann Mullins: Yeah. That's yeah, gosh, clearly high levels of frustration. So can understand that. Yeah, we are running out of time, but I'm going to ask you just a few more questions, just a little bit on, um, some of the continuous professional development. [00:02:00] So does your school collect SACE points? Do you look at continuous professional development around looking at SACE as well?

A : It was something that we brought up, um, last year, um, there was a lot of developmental things that were done with the previous operating partner, but nothing was accredited towards our SACE points. Um, yeah, this year, the only accredited things we could have done with the things that were delivered by WCED. Um, and those were far and few between, um, what we have done from the deputy principal and my side. Um, we belong to, SAOU um, so the teacher's union and they have sent out specific training as well. That you could accrues SACE points with, um, that was disseminated to staff outside as well. Whether they have done them. I don't know what knew what union was. Were you part of of? SAOU

[00:03:08] Bridget-ann Mullins: Okay. Um, so you, you and the deputy basically made teachers aware of training opportunities in the school. But that they will training opportunities that they then had to follow. Okay, cool. Does the principal also disseminate any training that he comes across?

A - The WCED training yes.

[00:03:29] Bridget-ann Mullins: Okay. Okay, cool. So that's basically teachers are made aware of trainings through emails from yourselves or from the principal, from the WCED or the, or the teacher's union that you've…. And then. But, but who attends and what kind of training and feedback on that training? Anything like that? That happens.

A : Unfortunately, we haven't had anything. It's difficult to assess when it's online training, who's actually sitting and doing the training and also, there is no feedback to the principal whether that the teacher has actually attended the online session of not. And it is quite difficult to gauge.

Bridget-ann Mullins: Yeah. And you you've spoken about some training that you had in terms of Bloom's taxonomy and, um, uh, classroom management.I think you said that was more general staff. (yes) Was that.

A – that was more inhouse training.

Bridget oh that was in-house. Okay. Okay. So again, not linked to SACE, so then your teachers want the SACE points, okay, cool. So you're not looking at how do you, how do you look at the development needs of the teachers, but then try link to the SACE training that's available as well.

Bridget-ann Mullins: Okay. But I'm pretty sure you can answer this one as well, but how, how, how has COVID effected your, um, professional development of the teachers?[00:05:00]

Z: Sorry, you're breaking up a little

Bridget-ann Mullins: Okay, cool. I just said, how has COVID affected the, the teacher development?

Z: Um, I think it's had a very negative impact on teacher development. Um, we don't get the opportunity to actually go into classes, sit alongside teachers, um, and actually see what the starting point was and how they've actually grown through their time here as well. Um, so, ya

Bridget-ann Mullins: I mean, it makes it almost impossible to identify their actual needs and this, unless they can actually voice them.Um, even just identifying those needs become tricky.

Z: So when you're a new teacher and you've been here for a couple of months or a year, so it's very difficult to actually pinpoint what [00:06:00] your, your weak points are and where it is that you need

[00:06:04] A : And I feel that is where us as SMT actually comes into play, where we actually have to take these teachers by the hand and take them through the entire process.

[00:06:13] Bridget-ann Mullins: No, absolutely. I completely agree with you. Gosh. So what are your views on the collaboration school model in terms of its feasibility in terms of being rolled out or expanded into South Africa?

[00:06:31] A : I would hope that it could be expanded, but from my personal experiences, I don't see any benefit at this point in time. I do understand the benefit of public partnerships, the help of those schools from, from that standpoint. But in the current context, I have not really seen that happening, which is quite unfortunate.

[00:06:59] Bridget-ann Mullins: That is. [00:07:00] Ya. Cause I know that you have a personal link to it as well for your own studies and, you know, um, yeah. And just, just some things that you would like

to see more of. Is there anything else you would like to share with me or discuss, or let me know further.

[00:07:21] A : I think we've been quite comprehensive this afternoon.

[00:07:25] Bridget-ann Mullins: Yes we have done well. We've done very well. So gosh, thank you so much for that. It's been, um, even through all the technology challenges we have forged a path. Thank you for that. Um, and yeah, then hopefully. Hopefully, I'll see you around. I'll definitely be popping in before the end of the year, just to, um, if any reports and stuff to feed back, but I'll let you know how it all goes and gosh

[00:07:54] Bridget-ann Mullins: All I can say is thank you very much for, for sticking with me and getting, and helping me get this done. So I really do appreciate it. Have a wonderful rest of your day. I hope you're often in meeting goes well now and enjoy it. Thank you. Bye bye.

Z – Thank you.

Appendix H: Example of Coding and Theme Alignment with Research Questions

1. Final Comparison to Themes

Research Question	Sub-question	Theme	Notes/ Codes
What are teachers' experiences on the performance management system in collaboration schools?	1. What are teachers' views of how performance management is operationalized within the school?	1.1) Two Systems 1.2) Role of leadership	Admin burden, confusion, communication, conflict, two gods, demanding, two systems Contracts, relationship, transparency, communication, permanent, feedback, guidance
	2. How do teachers' perceive the effects of performance management at their school?	A) Individual Effects 2.1) Effect One: Anxiety and stress 2.2) Effect Two: Demotivation 2.3) Effect Three: Extended workload and Administration B) Relational Effects 2.4) Effect Four: Narrow focus on learning 2.5) Effect Five: Reflection and sharing	Disappointment, stress, anxiety, fear, frustration, pressure, lonely Tickbox, motivation, not taken seriously, confidence knock, disappointed, disheartened Sacrifice, forced intervention, efforts, heavy, time consuming, after hours, weekends empty numbers, not a true reflection, teacher instincts, by myself, control, meaning, data, student results, performance meetings, sharing, improvement plans

2. Thematical Coding Sheets and Comparison

So tell me what you do at this school? **i.How long have you been teaching here?**	Max 3 years possible. Sample: 3 weeks - 2 years. (teachers)
Is it a WCED or SGB post? If SGB, elaborate on the recruitment process.	Criteria: Directly from University, Teach a Nation, ads on FB and Indeed. All SGB appointments. Panel interview with SOP/SGB & Principal., All male, 6-7 people, inimidating. First time teachers. Not all same salaries, not all same as WCED. Resigning of contracts with new SOP in 2021. 6 month probation, lack of permanent contracts. Compulsary after hours/ extra murals etc. Contract confusion - not permanent / permanent. Mould new teachers. undeclared amount on payslips, no communication on it. WCED obligations but acting as independant school. Dont have financial means to recruit the best teachers. Manage budget from WCED. Experienced teachers wont resign. Lack of teaching experience.
Can you talk me through a normal school day? **i.In what ways are the days at this school different or the same as ordinary**	There is money. Stressed. Clout, Finacial decision. We pay the SOP. not much difference. Student mindset, undertermined. Hooligans. SOP controlling interest. SOP put their foot down. SOP decides important whether applicable or not. many SOP members on the SGB, they influence the decision. we strictly have an NDA you don't say anything to teachers.struggle to replace previous teacher rep on SGB.establish a new culture. It's been a bit underwhelming.Fighting with in the group negatively impact on our school,I haven't seen much of a difference. serving basically two gods here,complying to WCED and the SOP.not relaxed environment. more demanding
Do you believe that teacher performance evaluation is important and why?	yes, validation, recognised. help guide me. Guidance, professional development, need input, transforming. Incredibly importan. More to control teachers. Road map, developmental. At the moment is it monetary not developmental
Prior to undergoing your IQMS or a performance evaluation / data analysis & report at this school where you given any information about what to expect? Please share what happened and your thoughts around this?	had IQMS/ QMS training, WCED lead, Online TEAMS. What it this? Student just asked me to complete forms. Never happened. I don't know. Disappointment in how (lack of communication), oh by the way, better prepared, stressful, department want us to do QMS. STF want own instruments, that was heavy. Two kinds of systems. Brief email. At beginning of year, but not for teachers who join through the year. Data: 5min email and quick chat. No introduction.
Let's look at the Data Driven aspects? Tell what all it involves, what process you have to go through and how it made you feel. **I. Are how are the student's marks, input and results used to review or impact on your teaching?**	Time consuming, self improvement plans, with SMT meeting, discussions, but only empty numbers, does show us gaps. By class, subject and individual. Assign goals to students. Name 5 interventions, reflect each term. Quite intensive stuff, letter to parents, very administrative, expectation for Saturday work, i have certain feelings about that, letter to sign now about extra curriculum activities- extra disciplinary curricular activites for remedial and consolidation. New job description. Does add value. Not a true reflection of the teacher performance. how do you conduct yourself professionally. I put data together force every educator and learning area in school. havent specifically pin pointed out teachers, but we have been discussing moving teacher based on results that are coming back
If a classes are performing well or poorly, who looks at this? Does it get spoken about with teacher? What occurs if students results are declining?	I don't even know, that's causing anxiety for me, target 5 percent higher, intervention plans, i am thinking it might not always be the educator, hope they send the person for training. I'm not aware of anything. it's a fear of mine, he learner's performance is it's a collaborative thing, I actually don't know, address the inadequacies, backlog, remedial consolidation,subject improvement plan literally appeared on my desk on Friday. It was whisked across me at the last period and I had to quickly sign it. I don't know, I honestly don't know. I think, I almost feel like there's definitely a piece of the puzzle that a lot of us teachers are not aware of, or that we're just plain missing. We don't know where the stuff goes, There's no transparency in terms of the process,I don't know what happens, it's not just purely a teacher problem, it's a learner problem as well, . And I don't know how they would even quantify our performance in class. it doesn't work but we need to prove, hey, we've attempted remedial, Ja, so the process definitely is flawed, It really is flawed. using the data and finding interventions that work.discussed at SMT level, but it will be discussed with the teacher, how to assist teacher to actually increase grades, We've had a couple of training sessions,There hasn't really been much training on, you know a lot of, no real focus on teacher, every department has worked on their subject improvement plan,every teacher has been contributed to the intervention plan,specifically with maths focus point math classes Monday to Thursday& Saturdays. I don't think that we are firm enough as management, take them to task, if we allow our underperforming teachers to keep on underperforming, we are not strict enough, So if you don't perform let's call it quits, management should first say what, where are we going wrong, develop them, f they just can't be reached then we need to cut the ties, We are collaboration school; we can do that. They just work for the SOP...But at the moment nothing is really happening but we could have identify the underperforming teachers, worried about the motivation levels, demotivated,9.I think it is quite stressful, especially for the teacher, because the students performance is going to be linked to your performance. And I've feel that that is not a true reflection of what the teachers capabilities actually are. Sometimes you just have a low performing cohort or a low performing class, and that reflects badly on the teacher as well. So it is quiet stressful for a teacher to see that, you know like, especially this afternoon, and I've seen it before when we have had some of the meetings when the marks for example for Maths goes up in grade 10 and you have a 24% pass rate for the entire cohort. We know you've got really good teachers in place, you know what it is that they're doing, they employing the strategies they have after school classes, but they're not really seeing a big change in the learner results. That becomes quite disheartening as well.
Tell me about your most recent performance review/IQMS. What all did it involve, what was the process that took place and how did it make you feel? Criteria/systems etc	so much admin, I was so lost, it seems fair, whole thing is just too time-consuming, is it going to be an honest review, am I going to get the honest feedback or am I going to get their biase, nviting someone in your personal space thats going to make me feel uncomfortable, I didn't really understand the data. cancelled that for now I don't know when that's going to be implemented again, once a year. criteria more for a teacher file, pack of paper, repetitive, frustrating, just be signed,sake of having a paper trail, there has been no feedback, Nobody's analysed it, she literally said okay, say yes here, say no there, what does this mean? don't worry about that, just say no here, absolutely no understanding, troubles me quite deeply, I bother me, I don't understand the process, I still don't know, I asked the question and nobody. I still don't know how to complete these things properly. I don't have an understanding of what the stuff means, general consensus process doesn't really mean much, just sign it, the actual purpose or the intention of this process is completely lost, They don't recognize the value that it could add if it was done … managed properly, it's stressful because it's time consuming, I think the teaching aspect needs probably more important. take out the stuff that you can't measure, work planpositive shift, IQMS was just a paper exercise, no real, real, real engagement, never ever going to get a real sense of the teacher, a window dressing. the document itself hasn't really lent itself to showing me the areas where I could actually focus on and strengthen my current position, transitioning from IQMS to QMS, a ticking exercise. I think they do (find it stressful)

Tell me about your last feedback session where the outcomes of your review where communicated to you, describe the setting and how you felt?	So I haven't had any feedback yet (data) 4. No we haven't had any meeting about it. he only feedback I got why my classes were not performing as well as the other teachers' classes. hasn't been any feedback. The support is non-existent. There is no feedback, there is no guidance. department sits together, we set up our subject improvement, little brainstorming session together plans, chool's remuneration policy was changed recently, so teachers who get a good IQMS are supposed to get a, sort of a bonus. delegate that to the HOD for curriculum, SFT will engage with it and then we take it to a big staff room, pushing for accountability. Teachers must understand that you are actually accountable for whatever the learners is producing.And transparency.Nothing to hide. This is about growth. every teacher is aware that we have these sessions, teachers to work with their own data, term to term basis, that information goes into the teachers file, I do the evaluation for the entire school, per subject as well, open book policy, the school has decided that they would like to go into the data driven direction, I like to see what my weak areas are and my strong areas are. IQMS, they give feedback and they have this post and pre-evaluation forms that we complete. With the data analysis that they are supposed to do I didn't come across any feedback yet. We do set goals and interventions that we are going to do but do we actually go and follow up on that? No we don't, Or not yet, As a department. (goals)10.Well, I think we have been using the IQMS last year, this year we still used the IQMS, but then I phoned WCED because they didn't communicate with me who is the coordinator of IQMS. So they said no it is not necessary for you guys, you collaborations school, to do this. So I left it
Would you say your last performance review IQMS and Data Analysis had an impacted on your teaching or work at all? How or Why?	it's difficult to do the intervention with so much to already do - so it is also one of the things that are scaring me, Ja definitely made it more but also made it more difficult because now you are in a space where you wonder am I actually getting this thing across and say if I don't get, say for instance I don't get the time to do the intervention... What is the consequence there will be of that?, I put in a lot of effort like a lot and I have been neglecting personal matters [indistinct] because I am attend to kids and then nothing,.. I have been sacrificing so much and its like..I have initiated reflecting about my teaching. massive amount of pressure for this data analysis, I tried to do it on my own, I was like at my wits end,please, I need help, I need some training, This doesn't make sense, it is my perspective, at this juncture, that this whole process is literally just a paper-pushing process, he had very much a similar experience, HOD basically ended up doing her stats for her, because she didn't know how to do the stats either, it left me feeling very, very frustrated. I was exceptionally frustrated. I felt very lonely, no wonder new teachers don't stick it out or any teacher for that matter, omebody who's decided, up there somewhere, okay, this needs to be done, but it doesn't mean anything. It doesn't have any value to me right now. It hasn't added any value so far to my stay, I was very disappointed. I was disappointed by how things were managed. I was disappointed by the leadership in terms of guidance and advice and support. The ... I think the lack of support and the lack of all that has probably made me a better teacher because I've trusted my instincts. nterventions is extra lessons in the afternoons. enlightenment, the impact, look at these graphs, it starts good conversations, it is very, very valuable, reflection, teacher looking at his or her performance, assume greater responsibility for their lesson for how they deliver the curriculum and more specifically for the performance of the learners.more work, have scheduled the meeting with parents, times when confidence and motivation definitely takes a knock, a bit of effort into classes, I've got after school classes. But it doesn't really show in my learner results, my confidence does taken a knock
What would you say are the main challenges the school faces with the current teacher evaluation system	there is not enough training on it, time consuming people are too confused strenuous,it creates chaos . how they are planning to review us, it's not communicated very clearly. Personally I think it's very poorly managed. must also be fully informed like the teachers are not properly informed, given to teachers timeously I feel like I'm missing a piece of puzzle but I get told things last minute ...It's very frustrating because I don't operate like that . We also don't have enough hands on deck when it comes to, to helping the teachers develop, because we have so many teachers that are new to the education process,Unfortunately, it's with time constraints, it's not something that we could actually do, And the same with the principal and deputy principal – its time constraints.I would say that QMS or IQMS must be done right through the year, create our own appraisal programme, how we appraise and not use the WCED one , . We should be able to look absenteeism great teacher absenteeism at our school.if you are able to have discipline then you can teach, comradeship where the teachers must work as a team

3. Selective Coding

	So tell me what you do at this school? i.How long have you been teaching here?	Is it a WCED or SGB post? If SGB, elaborate on the recruitment process.	Can you talk me through a normal school day? i.In what ways are the days at this school different or the same as ordinary	Do you believe that teacher performance evaluation is important and why?	Prior to undergoing your IQMS or a performance evaluation / data analysis & report at this school where you given any information about what to expect? Please share what happened and your thoughts around this?	Let's look at the Data Driven aspects! Tell what it all involves, what process you have to go through and how it made you feel. I. Are how are the student's input and results used to review or impact on your teaching?	If classes are performing well or poorly, who looks at this? Does it get spoken about with teacher? What occurs if students results are declining?
Question							
Summary	Max 3 years possible. Sample: 3 weeks - 2 years. (teachers)	Criteria: Directly from University, Teach a Nation, ads on FB and Indeed. All SGB appointments. Panel interview with SOP/SGB & Principal., All male, 6-7 people, inimidating. First time teachers. Not all same salaries, not all same as WCED. Resigning of contracts with new SOP in 2021. 6 month probation, lack of permanent contracts. Compulsary after hours/ extra murals etc. Contract confusion - not permanent / permanent. Mould new teachers. undeclared amount on payslips, no communication on it. WCED obligations but acting as independant school. Dont have financial means to recruit the best teachers. Manage budget from WCED. Experienced teachers wont resign. Lack of teaching experience.	There is money. Stressed. Clout, Finacial decision. We pay the SOP. not much difference. Student mindset, undermined. Hooligans. SOP controlling interest. SOP put their foot down. SOP decides important whether applicable or not. many SOP members on the SGB, they influence the decision. we strictly have an NDA you don't say anything to teachers.struggle to replace previous teacher rep on SGB.establish a new culture. It's been a bit underwhelming.Fighting with in the group negatively impact on our school,I haven't seen much of a difference. serving basically two gods here,complying to WCED and the SOP.not relaxed environment. more demanding	yes, validation, recognised. help guide me. Guidance, professional development, need input, transforming. Incredibly importan. More to control teachers. Road map, developmental. At the moment is it monetary not developmental	had IQMS/ QMS training, WCED lead, Online TEAMS. What it this? Student just asked me to complete forms. Never happened. I don't know. Disappointment in how (lack of communication), oh by the way, better prepared, stressful, department want us to do QMS. STF want own instruments, that was heavy. Two kinds of systems. Brief email. At beginning of year, but not for teachers who join through the year. **Data:** 5min email and quick chat. No introduction.	Time consuming, self improvement plans, with SMT meeting, discussions, but only empty numbers, does show us gaps. By class, subject and individual. Assign goals to students. Name 5 interventions, reflect each term. Quite intensive stuff, letter to parents, very administrative, expectation for Saturday work, i have certain feelings about that, letter to sign now about extra curriculum activities- extra disciplinary curricular activites for remedial and consolidation. New job description. Does add value. Not a true reflection of the teacher performance. how do you conduct yourself professionally. I put data together fore every educator and learning area in school. havent specifically pin pointed out teachers, but we have been discussing moving teacher based on results that are coming back	I don't even know, that's causing anxiety for me, target 5 percent higher, intervention plans, i am thinking it might not always be the educator, hope they send the person for training. I'm not aware of anything. it's a fear of mine. the learner's performance is it's a collaborative thing, I actually don't know, address the inadequacies, backlog, remedial consolidation,subject improvement plan literally appeared on my desk on Friday. It was whisked across me at the last period and I had to quickly sign it. I don't know, I honestly don't know. I think, I almost feel like there's definitely a piece of the puzzle that a lot of us teachers are not aware of, or that we're just plain missing. We don't know where the stuff goes, There's no transparency in terms of the process,I don't know what happens, it's not purely a learner problem, it's a learner problem as well.. And I don't know how they would even quantify our performance in class. it
Participant 4	4. This is my third week.	4. All men on top of that. There was not one female so ja I didn't like that.	4.If I need something like stationery or whatever, assignment I can just ask and fill in a form, like I need this and that and that and they bring it…. Yes I will order that though the school…. There is money available for posters. 4.It's no yes I am stressed because I am new and I don't know exactly and everything is new but in terms of what I've experienced with everybody it's there. 4. No it definitely is inclusive in terms of the type of kids that they allow into the school. However what are we are teaching the kids so that the kids become more inclusive? Because I have noticed a lot of racism, discrimination, stereotypes Like they do not see what you are doing is wrong sometimes… it's	4. I think as a teacher there is always room for improvement. … and I need some validation. 4 you should be recognised for what you are doing. Once again it is adding to that validation that I am being seen I am being heard so I feel like that's good, that's good. I always want to like I always want to be feeling that I am seen and whatever I am contributing is actually something. 4.it seems fair, I think they also need to be like i feel like one of the big things is classroom management.	way, because it was the first time. 4.we had some training on it, it was done by the WCED, it was an online TEAMS… and some of us have never done it before. So we going to have to do a more indepth training. What they told me was like different stages and depending on like what level of educator you are, depends on how you are going to be evaluated, who is going to evaluate you, also the process of it. So it's not just someone coming into your class it is you have a discussion or with that person, then you will plan the stuff then that person my interaction with this was, an assistant came into my class and gave me a list where I had to choose a colleague and I had to choose either Mr Grove or Alana or Ms Oliver, and then I asked for what is this? And then she said they are going to be sitting in one of my lessons and that is how they will be reviewing me. So, this was going to be our IQMS	4. You have self-improvement plans you must take data analysis of term two and at the same time when they need the data analysis you need to set up papers, you need to do it properly. 4. the data analysis is where we track not track but we basically use any classes' marks compare it the terms, compare the graphs on Excel with the marks we put the kids in a high, low and middle order and then we say what our intervention plans are but we have to fix it per class, 4. Yes so then now I count my codes, whatever. I count the number of learners in low middle and high order who is our improvement plans which is, we, they were class by class and per subject and then the first thing you do is you just take everybody's marks and you type up their names and their mark and then you assign a goal	4, I don't even know what the consequence of that it yet… I actually want to ask because I am new to the data analysis and so that is also one of the things that's causing anxiety for me. 4,So that is the mark they got for term two and I give them a target 5 percent higher for term three, and then my intervention plans. 4. I actually dont know. because i am thinking it might not always be the educator but it could be. i just hope they send the person for training.
5	5.So PGCE at Stellenbosch has to be your first choice. You can't have it as your second choice 5.In our class we only had five. (oh wow) So I was like, oh, getting a job is going to be easy. It wasn't at all 5.I am very thankful to get a position here. 5.1st of Feb. First position	5.I think the school only has SGB posts, because as I understand it I think the W…our payslips look like a WCED payslip, like, all of the benefits and stuff. So I think they pay our salaries and then all of us are just typically SGB employed. That's how I understand it. 5.There was another man. I don't know who he is. He is actually here quite a lot, but I think he is part of the SGB, not part of the operating partner and he does a lot of our development courses and things, like disciplinary stuff. And I know there were two contracts. So last year's contract is different than this year because this year we pay the operating partner apparently changed…. So we were supposed to re-sign because our…the union came to talk to us saying we have to have a signed contract. So not me, because I signed it the new	5.I think in the classroom itself there's not really much difference. I teach now very similarly as what a teacher in another school would. I think…I'm not entirely sure how the management structure work with the operating partner., I thought the operating partner gives us the money and then I found out we pay the operating partner to help us. I don't think… 5. But it's the other way around. We are paying them. Well, that's what I heard from a teacher. So it would not me be t… I think it is a very small-scale size school which I actually prefer. - So over here it's very much CAPS and it should be yes WCED sorted ja so in terms of curriculum it's as it should be in comparison with the normal classroom. I think the governing body you know naturally has a lot more clout they have got a lot more say in the decision making that goes around obviously behind the scenes…: Financial decision making as well I think and then their interest so right so we sort of function like an independent school, right so we still have all these responsibilities with the Department.But being a collaborative school, sorry Ma'am let me just rethink what I want to say now. If we, if we have as a collaborative school, we don't always have the financial means to recruit the best teachers.So, we are a collaborative school and as a result of that we are supposed to function as an independent school so we manage the salaries too. The Department gives us a budget.But we must break it down. Do you understand? So that is a big challenge and then the other	Hell yes, absolutely. Just out of a novice teacher's eye, I would really, really appreciate someone telling me whether I'm doing a good job or not. So, just to have an outsider in my classroom and to look at my results and how I'm teaching and how learners are learning and the strategies that I'm using and to help guide me. That would be amazing, yes. I think it's a good idea.	professional development in that aspect or that area so yes [indistinct] 6.No. I actually, you know, I take these things quite seriously and maybe I shouldn't because 6.And I never paid that input. I mean, all the teachers need that input. Whether they're open to it or not. They need the input. You know, ours is a profession that's forever been dynamic. It's forever transforming. And, it's something that is constantly, you know, being updated. So, you also need to be updated. You can't be, you know, precious about something, you need to be open-minded.	self-improvement plans with regards to that was the fact that I found out kind oh by the way that oh this IQMS that needs to be done oh you must this sign this page and sit in on your lessons. I was like okay I don't, I didn't know that that was happening [indistinct] so I was a little bit disappointed by that I would have liked to be told okay this is going to happen ...So I had a lot of anxiety about that as well…So ja that was a bit stressful and I informed teaching. 6.those learners need to receive intervention letters and they need to be in, their parents and them need to be informed of the intervention procedure. So you need to, it's	6.you need to analyse the data and compare every single learner that you have in your class…Then you need to structure what was their personal what do they call it or what was their personal achieving mark as in what is their goal. 6.. So it's quite intensive stuff that I've never done before and I haven't even looked at it. I don't even know where to begin I need to sit with that along with this somewhere now around compulsory education which was intended to be the little bits and pieces that are missing. So we've been discussing the possibility of moving teachers based on what we've seen and results are coming back.	5. What exactly is going to happen or even like you asked like what would happen to a teacher if their classes are just not improving like I don't , know. And I don't know how they would even quantify our performance in class. actually it's a fear of mine, the learner's performance is it's a collaborative thing. They need to be just as invested as what you are and it doesn't matter how invested you are in it's a team thing, it's a team effort. So if they don't come to school or if they bunk or if they don't do their homework or whatever it's problematic.I actually don't know. 6.I'll also share with you the, what else was there that I had to sign. Oh, jeez, they called it a subject improvement plan. Now, it was heavily focused on the fact that, you know, curricula wasn't covered as per normal planning, and what am I going to put in place to address the inadequacies of the fact that part of the curriculum weren't covered, things like the backlog, you know, what's remedial consolidation, you know,
6	I came back to finish my PGCE because I started at distance through UNISA 6: I started here on the 16th of August…So it's literally not even a month.	I saw an advert it was posted on Facebook on one of the two biggest teacher vacancy groups. 6Principal and School Governing Body members. So it was quite an intimidation thing… Ja all men …there where 6, Yes, so I'm a Teach the Nation fellow and that's how I ended up getting this post here, yes. So I was very shocked when I got the Teach the Nation Fellowship and I was sitting in a meeting with them and they said by the way you have been on the call now with the interview. I had no idea what post I was interviewing for because Teach the Nation didn't communicate all of the details, they just said you have an interview, it's with this school, so … had the interview and then I found out just after Christmas, I think just before New Years', Mr Grove sent me an e-mail saying you've got the job	4.I must say it was a big change because I'm used to working with small groups – 2, 3 kids at a time – or more one-on-one basis rather than trying to run with the number, the discipline of a whole classroom. 7. The biggest problem is obviously the community around is very poor and it's very difficult to change a student's mindset growing from up here. So you're trying to build a sense of excellence but all around you is poverty …and they get told that education is important but,… they don't see it.They don't have any evidence of it. They don't have any evidence of it so … I was actually speaking to somebody saying the students for us is we have a different cohort of students. I firmly believe so, you know. Ja there must be, I do believe that. But my challenge is, how do, they are now currently, we're still doing our so we still do WCED IQMS the scores must be in to deparment and I have issues with the instruments. Do you understand? And I mean, I have shared this with many people before. I think that in a school like this the core focus is obviously to swing the academic results. Do you understand? So, we should not be, all the other stuff that's not relevant or the stuff that you can't score, you must take out of the instruments.	Yes, it is incredibly important. The first thing is in terms of the check and balance against the teachers. 7. I think at this point it's more to control the teachers and ensure that the learners are actually learning something Well, there must be an appraisal system, I firmly believe so, you know. Ja there must be, I do believe that. But my challenge is, how do, they are now currently, we're still doing our so we still do WCED IQMS the scores must be in to deparment and I have issues with the instruments. Do you understand? And I mean, I have shared this with many people before. I think that in a school like this the core focus is obviously to swing the academic results. Do you understand? So, we should not be, all the other stuff that's not relevant or the stuff that you can't score, you must take out of the instruments.	7. all I've heard is that we capture your data at the end of the term for the tests and then they also run sort of like systemics where they take all of the grades in and they do a baseline test at the beginning of the year and at the end of the year you do certain tests and then they see what's 7. IQMS, and we were told to just watch the, or sit in the training. So I did that and that's basically all you need to know. We're only doing self-evaluations they have never been teachers okay so we did have the orientation around the IQMS, what are the expectations and so on. The situation where we find ourselves is that the department wants us to do IQMS. 8. And then the education ally when we, sorry these used to be STF but they would and develop their own instrument and that was heavy. 8. Ja, still sort of two kinds of systems. 8. We still going to have to do QMS.	7. It hasn't, not as much as it should have. I think most of the time we're just trying to survive the term because there is pressure to finish the syllabus 7. So the only time that we can do interventions is extra lessons in the afternoons or weekends and that's exactly what my extra lessons are intended for…so a lot of problems So, at the heart of the data is how you are going to inform your teaching. So once you set yourself your goals in terms of where do you need growth as a teacher, your personal growth plan? If you look at the PGC, from that data you can identify your weaknesses and also you need to do an item analysis of your work and then, because in some sections the teacher might be very strong whereas in others, they may be weak or they might not be as strong. So some parts of the curriculum they can deliver well over part they cannot. And you can only see that if you look at the data but you have to look at the data over a period of time and	7. (dta)this, this and this must appear on the document and that's what we do and then she takes that, she goes through it, she hands it over to the SBST –School Based … team, so it's like a management sort of, with the HOD's and the Grade Heads involved so they go through that and then hand that over to SOP. And then it obviously gets analysed and … what we analysed in the SGB meeting, so, it'
7	It's been about 10 months now, 7. but I'm busy with my PGCE so first two terms I had, my counterpart in the Afrikaans class is a Grade 9 teacher, he was my mentor teacher for my teaching prac so he gave me some feedback and sort of … [inaudible 48.24] as much as possible. So at least I had that sense of sitting in class and assessing me and learn from him a bit.	Well, the challenge for us is we are a collaborative school, right so we sort of function like an independent school, even though we still have all these responsibilities with the Department .But being a collaborative school, sorry Ma'am let me just rethink what I want to say now. If we, if we have as a collaborative school, we don't always have the financial means to recruit the best teachers.So, we are a collaborative school and as a result of that we are supposed to function as an independent school so we manage the salaries too. The Department gives us a budget.But we must break it down. Do you understand? So that is a big challenge and then the other	8. very difficult cohort of students. Yes it was the group of 2019 we started on 196 and we are currently 145 in Grade 10. So there has been a number of drop offs…lmost 50 of them. A lot of them went back to the Eastern Cape. It is all just movement 8. it was really painful. So, I worked to establish a new culture…., working through the learners what do we expect and our expectations 8. Unfortunately, covid throw a spanner in the works because the extra mural programme is also part of that culture 8. our motto is "Leaners today, Leaders tomorrow" so that is collaboration school, really passionate about making a change in the lives of learners. And that was my ideal. In the past two years, I feel like I've been an ordinary teacher at an ordinary school, and that I have personally have not made much impact as yet.	9.Definitely – it is very developmental, I know a lot of people will feel it differently. But I feel quite strongly about you know, teaching performance and you know how we grow as a	in and they see we discussed the, like this afternoon we are having a discussion, as full stuff. So what we'll be doing, we'll be monitoring and having a look at what we did in term three. And we'll compare that to the monitoring. So far, we haven't specifically pin pointed that to a teacher, but I don't know if it is something that we are going to do in future. If it has helped us inform where we see the little bits and pieces that are missing. So we've been discussing the possibility of moving teachers based on what we've seen and results are coming back.	8.For me it is also about using the data and finding interventions that work.	7.For me it is also about using the data and finding interventions that work.
8	8. since school opened in 2019. I opened the school with five teachers we worked 220, ag sorry 200 learners, sorry 200 learners.		together all the data that every educator and every learning area in school. This is why we discussed, like this afternoon we are having a discussion, as full stuff. So what we'll be doing, we'll be monitoring and having a look at what we did in term three.		COVID which I sort of understand. Um there was a brief email that explained what the process was going to be, the process included choosing your peers, it briefly went through was the evaluation process, and then what was expected after we went evaluation, the sitting down with peers and then finalizing scores. But like I said, everything was included in one email. And I think there was an expectation that I would have some background on the IQMS system, because I've been in education. So it wasn't an immense document that we had to read.		8.For me it is also about using the data and finding interventions that work. discussed with the teacher, as well. Because as far as possible, we would also try and try and meet the teachers needs and wants and specifically within the learning area as well. 9. For the most part , this year, I sort of had a look at how to assist teacher to actually increase grades. We've had a couple of training sessions…We've done some training on cognitive levels, just how to build that into teaching skills, and then following through into questioning as well on question paper. Unfortunately, we haven't had a lot of contact with curriculum or subject advisors this year. So there hasn't been a lot of training from that side, except for the training
9	9.2 years	9.	9.I went for a different interview and there at that school which was Scots Dene High, the principal and the circuit manager wanted me but the SGB felt that the person that was there for 30 years already should get the post and then they recommended me for this position, I didn't even know about it but when Kraaifontein high was looking for a deputy principal, they phoned me to say that they know that I was looking for something in the area. So that is how I landed up here in Kraaifontein high.	where you started, um it is sort of like a road map that is how I view it, um, you can see where you going to as well. So it gives you information about where you are on your journey. As an educator um I believe that professional development is something that is not specific to education it is something that needs to be implemented across all system otherwise you just stagnate and as teacher these days we cannot afford to stagnate 9.Definitely – it is very developmental, I know a lot of people will feel it differently. But I feel quite strongly about you know, teaching performance and you know how we grow as a	COVID which I sort of understand. Um there was a brief email that explained what the process was going to be, the process included choosing your peers, it briefly went through was the evaluation process, and then what was expected after we went evaluation, the sitting down with peers and then finalizing scores. But like I said, everything was included in one email. And I think there was an expectation that I would have some background on the IQMS system, because I've been in education. So it wasn't an immense document that we had to read.	9.	
10	10.I started last year, the beginning of 2020. 10. I've got a degree, an educational one, and then I've got one in industrial psychology which is HR degree.	10. What is nice about this school is that there are teachers that we recruit is normally straight from university or they are	10.It is a lot different in the sense that we are now serving basically two gods here, we are still working and doing everything complying to WCED and we have the SOP which is the school operating partner that also have their needs and you know wants that we need to supply to and that could make it more of difficult but hectic I would say because you need to comply to two different gods, WCED [indistinct] as it is and then the SOP is also giving orders and things that they want, that makes it different, also the timeframes and it's not as a relaxed environment as the WCED would be, so here it is more, I would say…I've been in corporate and the corporate	10.I think it is more for, it should be for more developmental purposes. How can we develop and it is at the moment it is monetary, it is 1.5% extra to your salary, but how does that improve you as a teacher? So it should be more developmental than anything else.	10.Ja we started last year, at the beginning of the year, for all the teachers 10. So we have our induction type of program per year. However, during the year there is still new teachers that comes aboard. I think that it should be more. Whenever you start have that induction for that teacher.	10.	10.10.Yes, we have. I don't think that we are firm enough as management. And I think we shouldn't be scared actually to take them to task. Because at the end of the day it is going to be the learners who still have a future to achieve that is going to stop there of if we allow our underperforming teachers to keep on underperforming…You know, I feel as deputy, I feel we didn't do enough and we are not strict enough to take them to task and say listen if you then, we have got five hundred and forty learners that we need to look after here. So if you don't perform let's call it quits. 10. No but I always tell Mr Grove that if we complain about