

‘They’ve Got Class!’

A policy research report on
Zambian teachers’ attitudes to
their own profession

VSO - Valuing Teachers

Acknowledgments

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Abbreviations used

AIEMS	Action on Improvement of English, Maths And Science
APL	Academic Production Unit
BESSIP	Basic Education Sub Sector Investment Programme
CSO	Civil society organisation
DEO	District Education Office
DFID	Department For International Development of the UK government
EFA	Education for all
GDP	Gross domestic product
GRZ	Government of the Republic of Zambia
HDI	Human Development Index
HIPC	Heavily-indebted poor countries
k.	Kwacha (Zambian Currency Unit) (k.5000 = 1 pound Sterling, August 2001)
MMD	Movement for Multi-party Democracy
MOE	Ministry of Education
NGO	Non-government organisation
PEO	Provincial Education Office
PETUZ	Primary Education Teacher Union of Zambia
PRSP	Poverty Reduction Strategic Paper
SESTUZ	Secondary School Teacher Education Union of Zambia
TED	Teacher Education Department
TLMs	Teaching and learning materials
TTC	Teacher training college
UNDP	United Nations Development Programme
VSO	Voluntary Service Overseas
ZCSS	Zambia Community Schools Secretariat
ZNUT	Zambia National Union of Teachers
PSRP	Public Service Reform Programme
PRSP	Poverty Reduction Strategy Paper

1. Executive Summary

During the World Education Forum on Education For All at Dakar in April 2000 one theme that emerged was that access to education has overshadowed quality in the push for Universal Basic Education in developing countries. It is well known that a major determinant of improved educational experience and outcomes is the quality of teaching, and there is much interest among policy-makers in improving teacher performance. Yet crucially, understanding of teachers' own attitudes to their profession is poor. VSO's experience, backed by desk-based and field research, suggests that if teachers are to be effective as the main deliverers of educational reform in the coming decade, significant investments in improving their motivation and professionalism are essential.

The aim of undertaking this particular research case study was to gain a better understanding of the factors affecting teacher's commitment and motivation to deliver good-quality education in Zambian basic and secondary schools, and to identify important issues that need to be addressed under current and forthcoming education policies. This report summarises the findings and makes recommendations that will also be taken up by a wider VSO advocacy policy initiative, 'Valuing Teachers', to be launched in 2002.

This research has built up a picture in which teachers' motivation emerges as a key factor in determining standards of teaching performance, with clear trends centring on four issues:

- Terms and conditions of service, including salaries but also the system of allowances and other benefits such as accommodation
- Management, including relations with regional education structures and in-school management
- Lack of professional support, development and training, including a lack of support for professional development and poor availability of in-service training
- A lack of voice for teachers in decision-making

The recommendations of this paper, as described below, are centred on improving teacher motivation through three specific measures, and securing adequate representation for teachers in decision-making processes.

1) **Terms and conditions of service**

○ Salaries

- Increase all teacher salaries above the poverty level
- Introduce a classification system to identify hardship schools and increase salaries for such schools
- Increase promotion possibilities for secondary teachers to be rewarded for remaining as classroom teachers
- Discontinue or greatly slim down system of individual allowances to allow for salary increase for whole teacher force
- Negotiate an adjustment of current donor funding conditions to cover cost of salary increases while public finances are insufficient

Accommodation

- Establish a set of criteria for allocation of teachers' housing, regardless of gender
- Improve community knowledge and capacity to access available donor and government funds for housing, in the absence of Education Boards

2) Management

- Offer in-service management training to head-teachers
- Ensure appropriate funding and support to Education Boards to allow them to take on management roles
- Once Education Boards are established, negotiate effective disciplinary and grievance procedures in schools

3) Professional support, development and training

- Refresh existing knowledge and capacities before focussing on new methods, materials and training
- Consider methods of reducing ranges of ability within classrooms, such as streaming or setting.

4) Teacher participation in decision-making

- Review teacher representation on Provincial Education Office Committees and if necessary replace by a more effective mechanism. Education Boards should ensure participation of teachers when implemented on a country-wide basis.
- Ministry of Education and donors to consult with civil society organisations to establish a clear communication channel to allow teachers to participate in policy dialogue
- Establish an Education Forum as recommended in the EFA Declarations of April 2000

Teachers should not be seen as mere 'inputs' in the delivery of quality education. To ensure commitment, motivation and high quality classroom performance, teachers' remuneration, management and professional support must be addressed. Furthermore, it is clear that policy-makers must take account of teacher voice in decision-making and planning to ensure that educational reforms do not founder on teachers' poor perception of their relevance and value in the educational system and society at large.

2. Introduction

2.1 Background

VSO believes that education is a fundamental human right and a key element in the development of individuals, communities and nations that enables them to realise their full potential. VSO works in education worldwide in order to improve the livelihoods, quality of life and opportunities for employment of disadvantaged people. VSO particularly focuses upon increasing access and improving the quality and relevance of education.

VSO has worked in education in Zambia for more than 40 years, placing teachers and teacher trainers to work with Zambian colleagues in classroom teaching, in-service and pre-service training roles. However, these roles are only sustainable if Zambian teachers are enabled to play their part in delivering good-quality education as set out in the Government of Zambia's education policies.

VSO's long international experience tells us that the performance of teachers is key in ensuring enhanced learning outcomes for children. Yet teaching quality is at best variable and at worst poor. VSO volunteers see evidence of this in their placements on a daily basis: high levels of absenteeism and inattendance at classes; failure to prepare lessons and schemes of work; failure to set and mark homework; inadequate discipline and dependence on outmoded teaching methodologies. These problems run deepest where disadvantage is greater, and especially so in rural areas.

'There's no wonder teachers sit in the staff room and do nothing, when their salaries don't get paid, and when they do, they're not enough to live off.'

Amanda Rowsell, Returned Volunteer Teacher, Nigeria

The reasons for this are complex. Preliminary research suggested that initiatives such as curriculum reform, introduction of new methodologies and even the provision of more resources and training are not the answer to the problem of poor teaching. Indeed, these and other attempts to improve the quality of education can lead 'innovation overload' resulting in teacher resistance and failure of such initiatives. Research further suggested that teachers' motivation is a significant determinant of the quality of their teaching. As the OECD/UNESCO publication 'Teachers for Tomorrow's Schools' (2001) observes:

'More information is needed about how teachers themselves view their profession and its demands and incentives, particularly at the classroom level.'

These issues are an ever-present concern to volunteers and colleagues. By virtue of the insights that they bring, VSO is well placed to make a significant contribution to the understanding of the problems and identification of possible solutions.

'Supporting and encouraging teachers, rather than continual new initiatives and criticism, are what is required to improve the quality of education.'

Sian Hickman, Returned Volunteer Teacher Trainer, Uganda

To complement the focus on improving quality of education in disadvantaged communities in VSO's programmes, this research initiative will explore the causes and effects of poor teacher motivation in disadvantaged communities, and will seek to bring about policy change to improve

teacher motivation. VSO will make an initial 3-year commitment to research and advocacy on this theme, based on volunteer and colleague experience.

By addressing these issues, VSO hopes to bring about change such that...

- Teacher motivation is increased
- Teacher performance is enhanced
- Pupils receive an education which is relevant, meaningful and meets their basic educational needs
- Pupils' educational attainment is improved

'The big educational project of many developing countries, in the next decade or so, is involving wholesale change on a level quite unprecedented in those countries. The successful management of this change is therefore crucial. However this cannot be undertaken without a clear understanding of the reaction of the professionals to changes in their work and the heightened expectations being made of them.'

DFID Education Paper: Roger M. Garrett, Graduate School of Education, University of Bristol

In a questionnaire sent out to VSO volunteers prior to the start of this research, it was found that out of around 50 VSO volunteer teachers working in secondary schools in Zambia, 40% think the teacher motivation is *the most important* factor affecting the quality of education in their school, while 60% rank the role of teacher motivation/morale as *very important* for the quality of the education in their school.

Therefore, the aim of undertaking this case study was to gain a better understanding of the factors that affect teachers' commitment and motivation to deliver good-quality education in Zambian secondary schools and to identify important issues that need to be addressed under current and forthcoming education policies. This report summarises the findings and makes recommendations that will be taken up by a wider VSO advocacy policy initiative, 'Valuing Teachers', to be launched in 2002.

This paper does not purport to be a full-scale analysis of the education sector in Zambia. The findings reflect the first-hand views and opinions of key policy-makers, practitioners and teachers in Zambia. They give a clear picture of how teachers in rural Zambia see themselves and how they perceive their profession.

The information was gathered in two Zambian provinces during August and September 2001 using desk-based research, a questionnaire given to all VSO volunteers in Zambia, a series of interviews with policy-makers and key stakeholders in education in Zambia, six field-based focus groups with secondary and basic school teachers, seven one-to-one interviews with teachers, and a round-table discussion with key stakeholders (see Appendices).

Although focus groups and interviews included a significant number of people (49 teachers, including 4 high school heads and 1 basic school head; 10 VSO volunteers; 25 other stakeholders, see Appendix ?), the samples were not randomised and so not methodologically rigorous. However, the research captures the essence of people's honest opinions that is so often missing from more academic research, and many of our findings are in line with similar research carried out by other organisations.

This research has built up a picture in which teachers' motivation emerges as a key factor in determining standards of teaching performance, with clear trends centring on four issues:

- Terms and conditions of service, including salaries but also the system of allowances and other benefits such as accommodation
- Management, including relations with regional education structures and in-school management
- Lack of professional support, development and training, including a lack of support for professional development and poor availability of in-service training
- A lack of voice for teachers in decision-making

The recommendations of this paper are centred on improving teacher motivation by action in these four key areas.

Footnote: Interestingly, a similar situation can be found in the UK as illustrated by the following quote:

'Widespread demoralisation and dissatisfaction, job-related stress, a steady exodus, teacher shortages and problems of recruitment have all been reported as prevalent among this profession in recent years.'

L. Evans, 'Addressing problems of conceptualization and construct validity in researching teachers' job satisfaction.' *Educational Research*, 39, 1997

3. Contextual Analysis

3.1 Socio-economic overview Zambia

Zambia is a country with low human development, ranking 143 out of 162 on the 2001 UNDP Human Development Report, with all this implies for the health, life expectancy and education of its people. It is one of the most sparsely populated and highly-urbanised countries in Africa, with a young population increasingly heavily affected by the HIV/AIDS pandemic, which has become a critical development issue for Zambia. Income is unequally distributed, with the top 10% of the population receiving over 50% of the per capita income, whilst the bottom 10% receive 0.5 %.

In 1991, the Movement for Multi-Party Democracy (MMD), headed by current President Chiluba, was elected on a platform of structural adjustment (SAP), economic liberalisation, privatisation and public restructuring. However, poor economic growth, high population growth, servicing debt and the impact of HIV/AIDS have meant that the socio-economic situation has deteriorated in the 1990s and in 2000, the country's total debt was US\$6.3 billion, with the debt service ratio at 37.2% of the GDP.

Privatisation has led to a massive loss of jobs, creating economic pressure at household level. Teaching is one of the few forms of employment that gives financial security. However, real wages have failed to keep pace with inflation, and teachers' salaries are currently below the poverty line.

In 2001, Zambia began to receive debt relief under the Highly Indebted Poor Countries Initiative (HIPC) which enables the budget allocations currently servicing debt to be shifted to education and health, but Zambia still spends only 3% of its GDP on education.

3.2 HIV/AIDS

Zambia is experiencing one of the worst HIV/AIDS epidemics in the world: The Zambian Ministry of Health estimated in 1999 that one in five (20%) of Zambians over the age of 15 would die of HIV/AIDS in between 2002 and 2009. The pandemic creates enormous pressure all of society. The impact of HIV/AIDS on the education system is beyond the scope of this paper, but it can be inferred (not least from VSO's wider experience of the Zambian context) that although HIV/AIDS was not mentioned directly by any respondent, reference to issues such as 'family problems' and increased pressure for relatives on salaries can be assumed to be partly as a result of the HIV/AIDS crisis.

There are a number of consequences for the teaching profession arising from the HIV/AIDS crisis in Zambia:

- In 1998, the deaths due to HIV/AIDS were equivalent to the loss of about two-thirds of the annual output of newly-trained teachers from all Zambian training institutions combined.
- Trained teachers with HIV/AIDS concentrate in urban areas in order to be close to hospitals, clinics or medical centres, intensifying the rural-urban drift.
- Many teachers are too ill to take on a full teaching load, so there is loss of teaching time and erratic attendance. This affects communities' perception of the quality of education and consequently households' preparedness to commit valuable resources in order to send children to school.

- The increased number of orphans being added to teachers' families, attendance at funerals, and the psychological effect of living within an HIV/AIDS epidemic is also undoubtedly having a major effect on the day-to-day morale and performance of teachers in Zambia.

3.3 Education policy and the structure of the education system in Zambia

The Zambian government's education policy

The Zambian Ministry of Education launched its national education policy, *Educating our Future*, in 1996. This policy aims to improve all levels of education. It focuses on restructuring the headquarters and provincial offices of the education system, and reducing staffing within most units in order to fulfil their roles better in a decentralised system. Decentralisation to district education boards (see below), cost-sharing of education, increase in the number of teachers, partnerships and provision of teaching and learning materials (TLMs) and infrastructure are highlighted for action in the document.

The international focus on access to basic education is reflected in the fact that the implementation of *Educating Our Future* has so far focused on the provision of basic education for all. At the time of writing this report, no strategic plan or implementation plans for the policies have been developed for secondary education.

Educating Our Future defines basic education as the first nine years of school. Provision of this has been made the top priority of government policy. Every child is expected to have access to nine years of basic education by the year 2015, therefore the school system is undergoing a restructuring. The following system was proposed: Basic Schools offering grades 1–9, secondary schools from 10–12 and tertiary education for learners who have completed grade 12. The current system comprises a 7–2–3 structure: seven years of primary schooling from age seven (four years of lower and three years of upper primary), followed by two years of junior secondary and three years of senior secondary. Transition from lower to higher educational levels was and is determined by national competitive examinations at the end of grades 7, 9 and 12. The transition from one to the other system has begun, but is not as yet completed.

The implementation plan for basic education, *Basic Education Sub-Sector Investment Programme* (BESSIP), aims to provide relevant and good-quality basic education to all children. The aims of BESSIP are to increase enrolment and improve learning outcomes. The first phase of BESSIP (1999–2001) supports the following five activities:

1. To provide additional classrooms, in-service education for teachers, and supply of learning and teaching materials.
2. To build capacity within the MOE to monitor.
3. To develop a framework for policy analysis.
4. To support decentralisation of services to the District Education Boards,
5. To assist the MOE to co-ordinate and utilise all external support.

3.4 The structure of the education system

The Public Sector Reform Programme (PSRP) of the early 1990s sets out plans to restructure the Ministry of Education, which has, however, not yet started. A further aspect of the programme was the commitment to decentralising management of education to local structures. Accordingly, some of the management functions within education have been decentralised to the Provincial Education Offices (PEO) and District Education Offices (DEO), although the process is not yet

complete. The PEOs house the inspectorate, hold decision-making powers regarding certain administrative issues for teachers and are now responsible for the payroll. This has reduced the problems that teachers previously had with the late payments of salaries. The DEOs do not have any financial decision-making powers and are mainly responsible for managing the basic schools.

The next stage in the planned decentralisation will be to hand over management of all schools to Education Boards: Basic School Boards, Secondary School Boards, College Boards and District Boards. These Boards will have all the legal, fundraising and day-to-day administration responsibilities to run the schools, which will be funded by user fees (80%, consultancy report 2001), income-generation projects and government grants. The Boards will include parents, local community representatives, regional officials and teacher union representatives. It is envisaged that these boards will take over many of the management functions of schools currently fulfilled by the Provincial and District Education Offices (PEOs and DEOs). Donors and MOE officials expressed great optimism that this will lead to improvements in management and administrative practice.

It was planned that by 2001 60% of districts would have Education Boards, however at the time of the research in August/September 2001, only the Copperbelt Province and North-Western Province have been allocated Education Boards as part of a pilot project running since 1993. A recently-published evaluation report found that the process of setting up the Boards was well-resourced and planned, was supported equally by the MOE and donor agencies and resulted in a sense of school ownership by the community. As a result, the process will now roll out to four other Provinces: Southern, North-Western, Lusaka and Northern Province. However, there is evidence to suggest that after the pilot period, during which funding was available, the effectiveness of the Boards declined. In areas where Boards are not yet in place the Provincial and District Education Offices still maintain management responsibility for the schools.

3.5 Types of schools

The four types of schools are:

1. government (GRZ schools)
2. private schools
3. grant-aided schools
4. community schools.

The majority of education providers are GRZ Schools. However, the community schools have been established and funded by local communities, particularly in rural areas of the Northern, Southern and Eastern Provinces, to overcome the shortfall in basic schools for all children. Community school teachers are often untrained or new graduates, and they have few learning resources and facilities.

Academic Production Units (APU) exist alongside the formal education system. For a fee, secondary-school teachers teach children who have not gained entry to secondary schools (mainly because they did not pass the entry exams). APU pupils do take part in the final exams. No research has been carried out to compare the achievements of these pupils with those in mainstream education.

3.6 Teacher supply and retention

In 1990 the Teacher Education Department (TED) was established with a mandate to spearhead the professional development of teachers for basic schools. The specific programmes established

for teachers include the Zambia Teacher Education Reform Programme (ZATERP) and in-service training for teachers through School-Based and Resource Centre-Based Training System (SPRINT). This initiative has come out of the Action on Improvement of English Maths and Science (AIEMS) programme, in which resource centres were placed in each district and were used for teacher training. Since a reduction in funding, such training has been taking place in basic schools and the teachers' diploma has been done through distance learning.

Although it is difficult to obtain reliable data on the number of teachers in the education system, according to Zambia National Union of Teachers (ZNUT) there was a shortfall of 18,257 trained basic schoolteachers in 2000. This shortfall is due to a combination of factors.

The loss of basic-school teachers from the profession has been estimated at approximately 9 - 10% per annum, due in part at least to HIV/AIDS. This translates into roughly 2,400 teachers leaving the education system every year. This is almost balanced by the 2,500 new teachers who graduated from teacher-training colleges (TTCs) in 1999 and 2000, an increase from the 1,800 in 1996–1998. However, newly-trained teachers have to wait for 9–15 months before they are placed on the education payroll, and in this time, some find employment elsewhere. In addition, it is clear that serving teachers leave the profession to take up other jobs or to work in the more favourable conditions offered in neighbouring countries such as Namibia or Botswana. Retired teachers do sometimes return to teaching in Zambian schools, according to the PEOs, who are very enthusiastic about this trend. However, the effect of all these trends remains a net loss to the teaching profession.

For secondary-school teachers, there is no specific data, but it was reported to the researcher that teacher supply cannot meet the demands for key subjects such as maths, science and English. It is also clear that secondary education in general suffers from similar problems of poor distribution of available human resources and the loss of trained teachers to other countries in the region. The MOE has attempted to tackle this problem over the last years by seconding primary teachers secondary schools to fill the gaps. This can, however, be a source of demotivation to existing, trained secondary school teachers.

3.7.1 International institutions and development agencies

A major focus on achieving international targets set at the World Conferences on Education in Jomtien (1990) and Dakar (2000) has influenced the strategies, and thus the funding, of multi- and bi-lateral agencies. These agencies fund 90% of the capital costs of BESSIP. As a group or as individuals, donors are able to influence the government and the Ministry of Finance and Economic Development as well as the Ministry of Education.

The IMF has a strong role in macro-economic policy dialogue. The World Bank is a major funder of BESSIP, having agreed two Adaptable Programme Loans (APLs) to support it. APL 1, for US\$ 40 million, was scheduled to expire in 2001, and the second loan is expected by the beginning of 2002.

The other major bilateral donors are Japan, the UK, Netherlands, USA, Canada, Germany and the Scandinavian countries, with most funding allocated to BESSIP.

The European Union has a substantial programme, but is not active in policy discussions, mainly focussing on infrastructure and micro-projects.

The UK government's Department for International Development (DFID) supports the education sector through a sector-wide approach. The budget is given to the Zambian government for implementing its education programme. Technical assistance has also been utilised to assist in development of education strategy. DFID also funds specific projects, including school-based in-service training for basic teachers.

The British Council has been heavily involved in setting up the AIEMS (Action on Improvement for English, Maths and Science education) programme. At the time of the research, the whole AIEMS programme had recently been handed over to the MOE.

Oxfam supports community schools, cost-sharing activities in infrastructure, and advocacy. Oxfam facilitated the Memorandum of Understanding between the Zambia Community School Secretariat (ZCSS) and the MOE, and assisted NGOs in their production of the shadow Poverty Reduction Strategy Paper (PRSP).

VSO supports the MOE by placing VSO teachers in classroom teaching roles in disadvantaged rural secondary schools in the under-developed north-western and eastern provinces. In basic education, VSO mainly works in pre-service and in-service teacher training. A notable success has been the TOPSUPP programme, where VSO has supported an innovative programme in one of the most disadvantaged rural provinces, which enables teachers to gain formal teaching qualifications while working. VSO supports the provision of education to children with special learning needs through a team of special education teachers and occupational therapists in training/resource roles in special units for deaf or blind children. VSO also provides a small number of volunteers to support community schools in capacity-building roles.

UNICEF is an important partner for the government, mainly in health and children's rights.

3.7.2 Civil society organisations (CSOs) / non-government organisations (NGOs)

Civil society in Zambia is beginning to grow in strength and influence and there are quite a number of national NGOs working in education. Five NGOs attended the Education For All (EFA) conference in Dakar and have since begun to form an EFA forum to participate in policy dialogue with the Ministry of Education. The group is also hoping to form an Education Coalition, which would have a stronger voice to influence government. The MOE has asked one of the CSOs to participate in the discussion for the government's Poverty Reduction Strategic Plan, and to contribute to the chapter on education.

The Zambia Community School Secretariat (ZCSS), the umbrella organisation for all the CSOs involved with over 800 community schools, successfully advocated for the integration of community schools into the national system. The next step is to place untrained community schoolteachers on the government education payroll.

3.7.3 Religious institutions

Before independence, most schools were run by churches, and were handed over to the government upon independence. According to some sources, some schools have been handed back to missions. A number of teacher-training colleges and secondary schools, as well as community and basic schools, are run by churches.

3.7.3 Teacher unions

The oldest teacher union in Zambia is the ZNUT (Zambia National Union of Teachers). Primary teachers split and set up PETUZ (Primary Education Teacher Union of Zambia),

followed by the secondary school teachers' founding of SESTUZ (Secondary School Teacher Union of Zambia). Whether these splits have strengthened the unions remains to be seen. In the latest strike, different unions negotiated for different increments, and there are conflicting reports of the outcome. It seems clear from this that unity is lacking.

It is against this context that the research findings are presented.

4. Research findings

4.1 Introduction

The VSO research strongly bears out the preliminary research indications that teachers are demoralised and that this is having a detrimental effect on their performance. Anonymous questionnaires given to teachers attending the focus groups showed that around half ranked their motivation low or medium, and placed their performance at the same level. The other half put their motivation at low to medium level but ranked their performance higher. These findings mirror the outcome of a study carried out by an NGO (Jesuit Centre for Theological Reflection) that found that 69% of all Zambian teachers are too demoralised to teach.

Amongst VSO teachers working in secondary schools in Zambia, 60% rank the role of teacher motivation/morale as *very important* for the quality of the education in their school, 40% think the teacher motivation is *the most important* factor affecting the quality of education in their school.

This research concentrated on the rural areas of Zambia, and it is clear that a number of the problems commonly identified by teachers were perceived to be worse because of their rural location. It is recognised in *Educating Our Future* that the deployment of teachers in Zambia is currently very uneven. In some urban areas, classes have a student-to-teacher ratio of 18 to 1, while the national ratio is 45 to 1. This means that in rural areas the ratio must average 72 to 1. Although there are some initiatives to encourage teachers to move from urban to rural areas (for example, rural hardship allowances, covered below), this has not been enough to counter the trend. During this research, an informant at the World Bank suggested that some of the HIPC funds should be used to even out teacher deployment:

‘Improvement in teacher compensation and deployment, including redeployment of excess teachers in urban areas as justified, will be undertaken in the context of the Government’s overall Public Service Reform Programme (PSRP) ’ (World Bank BESSIP document, 1999)

The effect of teacher demoralisation cannot be overestimated. Government and donors depend upon teacher performance as a major determinant of improved learning outcomes in the secondary education system, and where investments are anticipated in innovations that depend on having a body of motivated and skilled teachers, there is a pressing need to address the problem of poor teacher motivation.

This why it is important to address the issue of teacher motivation if equitable access to good quality education is to become a reality for Zambia.

4.2. Teachers’ needs in national education policy

The national education policy, *Educating Our Future*, seeks to address fundamental concerns about how to maintain an adequate teacher workforce. There is an apparent recognition that poor working conditions, leading to low morale, are a major factor:

“In order to reduce this loss of trained teachers from the public education system (and the wasted cost to the Government of training teachers that are lost from the system) it will be necessary to raise the compensation of trained teachers above the poverty line and improve the teaching conditions, resources and other non-salary benefits such as pensions and accommodation,

...dominant factors to teacher wastage are the material incentives represented by salaries and conditions of service...Dissatisfaction with conditions of service relates to:

- lack of proper accommodation
- lack of housing schemes
- inadequate provision of loans
- absence of a health scheme
- poor promotional prospects and lack of clear guidelines regarding promotion
- concern that corruption affects promotion and selection
- difficult communications with the employer, with a sense that teachers' problems are disregarded.

Schools cannot be effective if teachers are demoralised...Ongoing professional and personal development, which lie at the very heart of school and educational improvement, are not the priority concern of a person whose remuneration does not match the status and responsibility attaching to his or her appointment.”

BESSIP, the main implementation programme of *Educating Our Future*, acknowledges the underpayment of teachers and the poor administration of salaries as factors contributing to low morale and motivation. Other factors it addresses are poor training, poor preparation and posting and lack of support within schools.

However, this recognition at policy level seems not to have resulted in any direct interventions to address them. The programmes for teachers in BESSIP documents seem to be primarily aimed at improving teachers' performance rather than improving the morale of teachers. The specific projects are: the provision of 5 million textbooks, a new approach to pre-service training, continuous professional development through teachers' resource centres, support for the decentralisation of school management and administration to Education Boards. To increase the number of teachers, a project is underway to encourage retired teachers back into teaching. These initiatives, however, do not address the fundamental issue of teachers' de-motivation, and its negative impact on their performance.

4.3 Policy commitments and research findings

We explored teachers' own views on the impact of government and donor policy and practice on their motivation, and explored the issues identified with a range of policy stakeholders.

The main areas of concern identified by teachers were:

- Terms and conditions of service, including salaries but also the system of allowances and other benefits such as accommodation
- Management, including relations with regional education structures and in-school management
- Lack of professional support, development and training, including a lack of support for professional development and poor availability of in-service training

Underlying these issues is a further area of concern identified by the researcher, through consultation with policy-makers and key stakeholders:

- A lack of voice for teachers in decision-making

4.4 Terms and conditions of service

Educating Our Future recognises that to improve teachers' commitment and motivation their terms and conditions of service must be improved. It is acknowledged that salary is a major factor in this, whilst clearly stating that increases will be hard to achieve.

“The MOE will strive for improvement in salaries within its capacities which depend on the revenues from the public.”

Salaries

The research found that, unsurprisingly, the extremely low salaries paid to teachers in Zambia are a major factor in their poor motivation. The average net monthly wages of teachers interviewed for this research varied from K 170,000 or US\$44.00 (basic school teacher) to K298,000 or US\$77.00 (headmaster of a secondary school). The monthly cost of living survey in June 2001 estimated the cost of a basket of food for a family of six to be K328,570, or US\$85.00. This shortfall has doubtless been a major cause of the outflow of teachers to neighbouring countries such as Botswana where the average monthly salary for a teacher is US\$300. Zambian teachers who have remained in the system boost their incomes through extra-curricular activities, either through small business ventures, second jobs or through the APU afternoon schools. This has had a detrimental effect on teachers' classroom performance as they are tired and distracted during their time in school and in some cases take time out to attend to other business.

Furthermore, and perhaps more crucially, it is unrealistic to expect high standards from teachers while giving them a salary below the poverty line. Teachers feel disrespected by their employers and, in some cases, by the wider society. In the range of interventions to be taken, securing a salary above poverty level for teachers, so that their income is comparable to professionals in other sectors, is urgently needed if they are to meet the expectations of donors and the government as deliverers of high quality education.

Educating Our Future clearly stated the need for improvement of salaries and in discussions for this research it emerged that this view is still supported by the MOE and well as by major donors. VSO supports the basic principle that for countries such as Zambia it is important to restructure and slim down civil service apparatus, and that reallocation of resources within the system, and increasing government revenues is an urgent priority. However, the current pressing situation may require both a review of the budget allocation by government as well as a search for ways in which teachers' salaries can be raised above poverty level through donor involvement. Donors appeared to concur with this analysis, with one World Bank official expressing the view that there might be a need to abandon the payment of allowances and just increase salaries, and a DFID official wondering aloud whether salary costs could be taken up by donors.

“I get K 198,000. I have 6 children, need to send 2 children to school and that takes up K144,000 per term. The children of my sister now depend on me as well, so when I come to school, I know I have not solved the problems in my family and that bothers me.” (Male teacher, Boarding Secondary school)

“I have a big family at home, my salary is finished in one week, so we borrow here and there. The other thing you would see is that I will not knock off at 13.00 hours exactly, as I have a tailoring project in town, so I have to deviate to that project...If I had enough money I could use this time to prepare lessons. I'm aware this time is being misused by me in going absent, but teaching cannot be my main occupation.” (Male Teacher, Secondary school – Day)

In May 2001 80,000 public servants, including teachers, went on strike for three weeks demanding a 100% pay rise. The strike resulted in the award of a salary increment. However, it was reported that percentage increases were awarded differently to members of different unions, varying between 30 and 80%. It was unclear from the research whether this was true or not.

Allowances

The policy commitment to attract teachers into rural areas has been addressed through the launch of a rural hardship allowance, which can be claimed through Provincial Education Offices and District Education Offices. However, the allowance is not enough to attract teachers to rural areas. Many young teachers are still refusing to be deployed to rural areas where their services are most needed. There is no higher entry salary for rural areas as yet.

More generally, the allowances that have put in place to recompense teachers for specific extra duties have turned out to be a reason for low morale. Allowances are payable for a variety of reasons as well as rural hardship; extra duty (such as hostel supervision); double shifts (basic schools only); out of school time; leave; retention; teacher transfer from primary to secondary. However due to the complexity of the system of allowances and the unwieldy bureaucratic processes involved in payment, the situation is such that a huge number of teachers find that payments are either not made at all, or made after a long time and after a huge investment of energy. The delay or in some cases apparent obstruction to the payment of allowances results in teachers feeling frustrated and angry, and to a perception that poor financial accountability at DEO and PEO level is responsible. Where teachers observe colleagues who have been paid allowances more promptly, feelings of jealousy and mistrust result.

“I did a full year of double shift teaching last year, up till now I have not had my allowances for that, I followed up on that; I walk to the DEO’s office (15 km), take a form, walk back, have the head to sign it, bring it back to the DEO’s office, and then...”
(Male teacher, Basic school)

Accommodation

A further issue of concern to teachers, as recognised in *Educating Our Future*, is accommodation. A large number of houses have been built over the last years, mainly for basic schools, which is certainly to be applauded. However, the situation remains unsatisfactory, and teachers have not had access to loans to secure accommodation, nor were they prioritised as potential beneficiaries of the recent sell-off of government housing. The MOE has also said it is planning to promote home ownership programmes but it appears that to access such schemes the community must take action in the form of the District Education Boards which have not yet been fully implemented, as noted above.

Teachers who have been posted to rural areas and who have no access to permanent, affordable and appropriate accommodation are thus occupying themselves with searching for other accommodation and in some cases in seeking transfers. During this research, teachers reported that the poor situation they are housed in is a daily source of irritation and ill-feeling. In one situation, two teachers spent a whole year living in a narrow office between 2 classrooms. Teachers who did have a house often complained about the state of the house or the size of the house. This is especially true for female single teachers who are often forced to share a house with a colleague together with their children. For married female teachers, the main problem encountered is the perception that they have no need of housing as it is assumed that their husband will provide for them. In some cases it is equally the feeling of being neglected or disregarded that results in poor teacher motivation as the practical problems it poses.

“The minister really does not care whether I live in a house or under a bridge.”
(Male teacher, High School Day)

“A male teacher has a house, without putting across any marriage certificate, he puts in a girlfriend,. Meanwhile we are 4 female teachers here and we all have our own kids...They say that actually our husbands are supposed to take care of a house for us. Where we do not have [a husband], like some of us, they make us share a house, with our children in a 3-room block...Maybe we are not friends; we do not even speak the same language. We are 2 adults and 8 children together, while that male teacher has the whole house to himself and his girlfriend.”
(Female teacher, Secondary school)

Having secure and proper accommodation, (such as can be seen in some Mission Schools) makes teachers accept their rural posting more easily, and might give them a reason to settle in rural areas instead of seeking postings in urban areas. Whereas donors might continue to build houses, other ways to address this issue might be through granting house loans to teachers. A number of the teachers mentioned they would be very interested in taking up such an opportunities. There are funds for example from the Finnish Government as well from other small investment supporters to cost-share in those building activities, but seems that these initiatives are not widely known. As long as the Education Boards are not yet in place (see below), PTAs might be assisted more directly in accessing funding for accommodation.

4.5 Management issues

Relations with District and Provincial Offices

One of the fundamental measures identified within *Educating Our Future* is the de-centralisation of the management of education to Education Boards, as noted above. However at the time of this research only 2 regions had piloted the use of Education Boards. Though plans for extension have been made and technical assistance in this process is being sought, it is not likely that these Boards will be functioning in the regions where this research took place in the next 2 years. In the meantime management of schools in the majority of regions, including those where this research was conducted, still takes place through the Provincial Education Office (PEO) and District Education Office (DEO) structures.

The relationship between teachers and the PEOs and DEOs is somewhat problematic for both parties. PEOs and DEOs are the main point of contact between the education administration and teachers, who unfortunately feel that they are faced with a lack of accountability and unhelpful bureaucracy. This is particularly true in respect of the payment of allowances, and teachers' strong perception is that problems in this area derive either from inefficiency or misuse of funds. There also is a lack of clarity for teachers about the roles and responsibilities of the Education Offices. Staff often approach teachers from behind a huge desk, and cover up their staffing and financial limitations. PEO and DEO officials, interestingly, seemed to be well aware of the problems teachers faced, and acknowledged in some cases that teachers were not well treated on visiting the offices. They felt ill-equipped to address teachers' concerns due to shortage of manpower and resources. In order to try to improve relations between teachers and regional offices, representatives from teacher unions are invited to attend committees that preside over allowances and promotions. However, information does not seem to get through to teachers in the field, either because the teachers are unaware of the arrangement, or because they do not trust such representatives to do their job.

“We were asked by the DEO to fill in a list of TLMs needed. FIVE Heads of Departments spent a huge amount of time finding out the exact needs of the school. Then they travelled to the DEO’s office and spent a whole day there to list and write everything out. This has been very detailed work. We have not heard anything since...” (VSO volunteer Science teacher, Secondary School, Boarding)

“I would really like my leave, if you save it up for three years than you have k2,5 million, I could use that to build a house, but as for the PEO’s office, you come and go, come an go, come and go. I think if you want it you would have to give them part of it.”(Male teacher, High School Boarding)

In-school management

School management seems to be a neglected area in the eyes of the other stakeholders and in the policy documents. In *Educating Our Future* management training for head-teachers of basic schools is mentioned and has reportedly been carried out, but no such provision has yet been proposed for secondary schools, despite an apparent need to support head-teachers to build better employee relations and manage their staffs’ performance effectively. At present many struggle to do so, partly because their own appointment has been based on seniority in school, rather than genuine assessment of their management capabilities, and partly because they are offered little in the way of training and support. It might be that the implementation of Education Boards will provide opportunities to address the issue of conduct and performance of teachers or heads, if the Boards function well. However as noted above, at the time of this research the establishment of the Education Boards had not yet been fully implemented, and it was unclear whether they would be adequately resourced to enable them to take on an appropriate monitoring role in this respect. Other commitments include plans to ensure that promotional paths should be structured *within* teaching in order not to lose teachers from the classroom into administration or general school supervision, which would be welcome if matched by a similar commitment to support new head-teachers. Plans were also made under *Educating Our Future* to establish a Teacher Accreditation Board in order to set and maintain standards for teachers in Zambia

In the meantime, management practice seems to play a key role in the motivation of teachers within schools, and it is immediately evident on visiting a school, whether the head is functioning effectively or not. The interactions between head-teachers and their staff was a particular concern to many teachers. Many examples were cited including:

- Not being listened to, not being heard, a feeling that a head does not take on board what he hears from the teachers
- Being disrespected by the head. Examples of this were being reprimanded in the presence of pupils and colleagues, or being asked to make apologies after speaking out an opinion in a staff meeting.
- Feeling that the head does not stand up for teachers at the Education Offices and does not defend their case for allowance or leave.
- Unfair promotions, with teachers who are new to the school being made Head of Departments before the older teachers.
- Female teachers not being given certain responsibilities (acting in his absence, administrative responsibilities)
- Female teachers often felt that the head was more likely to believe male teachers and act on what their word.

Where relationships between the head and staff were less than positive, this also tended to have a negative effect on relations between teachers themselves. This was especially true for female teachers who felt that they were the object not only of generally poor management by head-teachers but were specifically overlooked for promotion on the basis of their gender, and in some cases suffered sexual harassment by male teachers.

If you just get a word of appreciation, just a remark, it already does a lot to make you happy – whether it is the headmaster, or the District Education Office. Even if resources were there, it would be important.’ (Male teacher, Secondary school - Boarding)

‘I can give an example of that, sometimes I come very happy from my house, I reach the administration, he [the Head] says some things to me. Instead of calling me to the office, both my colleagues and pupils see and hear how he talks to me, that makes me unhappy. I do not teach very nice then, sometimes, I do not even go in the class or sit in the staff room.’ (Female teacher, Secondary school Day)

‘My fellow teacher proposes love to me, but I don’t want it and I deny him. Then he goes to the Headmaster and tells him I don’t do my job and so and so... Of course the Head listens to him, so what can I do?’ (Female teacher – High School Boarding)

Addressing management is key to ensuring improved quality of education in Zambia. After some years of neglect of the secondary education sector, in a number of secondary schools a generalised climate of low morale can be observed. In a number of instances the secondary school teaching profession has reached a stage where it is considered acceptable to practise ‘remote teaching’ (the practice in which teachers write notes on the chalkboard, or set pupils a chapter of a book to read, and then leave the classroom), where teachers have started to make money outside their job, and an atmosphere of minimal effort has become normal. This situation is in some cases exacerbated by the management practice of sending teachers to remote places as a punishment. In two cases in this research teachers who had respectively stolen, and misbehaved with female students, were transferred to a rural area.

It seems not all schools have declined to this extent, with various sources reporting that the climate in the Catholic Mission schools is much healthier. This appears in part to be due to slight financial incentives but more importantly through the promotion of an atmosphere of work, with the added condition that in the case of poor performance or misconduct, teachers are sent back to government schools. It should also be noted that the phenomenon of de-motivation of teachers is relatively recent, with a number of the older teachers recalling the 80’s as a time when a respectful and serious school environment was still common.

4.6 Professional support, development and training

All teachers reported a perception that their continuing professional development was not prioritised sufficiently. In-service training does take place in basic schools, though apparently not very systematically. The SPRINT programme, where basic school teachers come together to discuss problems, happens at various schools, and DFID has launched a Primary Reading Training programme in basic schools in 3 pilot districts. Some teachers do manage to upgrade their qualifications; either leaving schools to go for courses, or following the Distance Education Course. No statistics could be found on the number of teachers benefiting from this intervention. Basic teachers’ main option still seems to be to go for a course and then to move

into teaching at secondary level, although the Primary Diploma should make a difference in that perspective. The next step for teachers is still into the inspectorate or into administrative tasks.

At secondary school level, short in-service training seems to be missing completely.

All teachers, but especially secondary school teachers, perceive the lack of short in-service professional development opportunities as a confirmation of the authorities' disregard of their needs. As noted above specific courses are available to teachers aimed at upgrading their qualifications, but logically this can only be available to limited numbers of teachers due to the fact that they entail teachers being released from school. This will necessarily be a very expensive and small-scale approach, however worthy it may be, and takes teachers out of classes for prolonged periods. However under the current promotions system it is often the only way for teachers to improve their salary level. In the research discussions it appeared that what teachers miss is the opportunity to share problems in short courses or meetings, through on-the-job support, and to be reminded of what they had learnt in college.

This lack of opportunity to reflect on and improve their performance has led to a situation where teachers are reluctant to adjust their methodologies to incorporate more interactive approaches, and rely instead on the 'chalk and talk' approach with which they feel more comfortable. Clearly, this is particularly problematic where curriculum changes require new methodologies to be deployed.

"The syllabus is good, It was syllabus D when I started in 1985, and it is still D, but maths does not change and the pupils are every time different and I know it very well by now. But I'm still using the methods and the schemes that I learnt in college 15 years ago." (Female Maths teacher, Secondary school - Boarding)

'Still we have meetings every week, in these meetings we have a lot of nice ideas, plans for observing, but when you're out of the meeting, it does not happen!' (VSO volunteer Maths Teacher, Secondary school – Boarding)

Teaching and learning materials

Educating Our Future cites the neglect in the supply of teaching materials for secondary schools as a problem for the delivery of education. At the time of this research the secondary curriculum was under review. The revision of the curriculum may mean that existing materials have to be replaced to ensure the successful implementation of the new curriculum. It remains to be seen whether this will be afforded a high enough priority to make the new curriculum workable, but it was clear from the research that donors and government policy-makers are aware of the problem.

Having no textbooks or supporting materials, particularly science and home economics equipment, leaves teachers with very limited and inadequate approaches to teaching. This seems to affect the quality of their lessons more than lack of knowledge of teaching techniques per se. Teachers seem to be aware of different teaching styles and techniques that they could apply such as group work and other interactive methods. However any newly learned methodologies and interesting lessons often founder on the lack of materials. Basic things such as textbooks are seen by teachers as very important to their performance in class.

My colleague has very good ideas to teach, but he will need to go and buy manila paper, felt pens and scissors himself to make the materials he needs for those lessons, and he can't!"
(English Teacher, VSO volunteer)

“Nowadays it takes me much more effort to teach, this week I have to explain the children what is a train, last week I has to explain them what was a robot, we have never seen those here!! And they will be asked about it in their exams!!” (Female Teacher, Basic School)

4.7 Other factors

Teachers cited the problems they encountered in trying to teach a class with a huge variety in abilities (including teaching a number of less able pupils who should not have had access to the school) as not only very difficult but also very de-motivating. Schools are not incentivised to remedy this situation because by refusing entry to pupils who do not achieve the entry standards, the school will be unable to collect sufficient school fees. Furthermore, by having proper, regular and fair exams a school gets lower results and therefore attracts unwelcome attention from school inspectors. It appears that schools are in a vicious circle of accepting less able pupils (especially in the poorer schools) and having to cheat on exam results. Apart from the move towards cost-sharing in education and the setting up of an examination council there seem to be no means of addressing this in *Educating Our Future*.

“Maths is known to be difficult, that is also what other teachers tell the students. It is not obligatory, so pupils just tell me, ‘I don’t care, I will not write [take the exams] in grade 12, I need English.’” (Female Maths teacher, Boarding Secondary school)

5. Recommendations

5.1 Introduction

As noted above, *Educating Our Future* contained a number of positive policy commitments to improving teacher motivation that have yet to be implemented. To date, BESSIP is the only strategy or implementation paper to have emerged which would allow this to happen. Furthermore, changing circumstances and emerging trends since 1996 have impacted on the education system in a number of ways implying, in some cases, the need for new policies and practices. At the time of this research, strategies for the existing *Educating Our Future* policy are finally being written and the PRSP is in development.

This is therefore an opportune time to make recommendations based on VSO's experience and on this research to feed into this process.

Fundamentally, the findings of this research strongly support the view expressed in *Educating Our Future* that there is a need to address teacher morale in order to deliver the desired improvements in the quality of education. Measures to increase the number of teachers must be balanced with practical steps designed to ensure that teachers are performing effectively, as well retaining them in school.

As donors' and the government's attention is now drawn to the issue of secondary schools, there may well ensue a range of interventions addressing some of the practical needs of teachers to attempt to improve their performance, and these are to be welcomed. It seems likely, for example, that the MOE, with donor support, will begin addressing the issues of accommodation, salary and teaching and learning materials. This is essential for the improvement of the motivation and thus performance of teachers. Indeed, the research has strongly indicated that without improvements in financial reward for teachers, there is only limited possibility for improvements in the quality of secondary school education. It must also be noted that it appears that even in the event of such an improvement, and addressing other material concerns of teachers, substantial work on management at school and district level will have to be done to ensure that the poor climate in education is improved. For example the researcher encountered a school with a complete science lab, saw a school with very nice houses, and met teachers whose salary had just increased a 100%, but it appears that addressing such issues in isolation from others does not automatically lead to better, more motivated teachers. A complex set of actions, involving improvements in management structures and approaches, must accompany any straightforward material inputs to the education system.

A further key point to note is that donors' and government priorities for secondary schools are contrary to the teachers' perception of the problems in education, their role and their support needs. Broadly the policy-makers' line of thinking seems to be that improvement of teaching methods (largely, though not exclusively, through pre-service training) development of new materials, and revision of curricula, will address the problem of poor pupil attainment. Meanwhile from the research process it was apparent that teachers' poor motivation has a negative effect on their performance, which in turn has a critical impact on pupils' real opportunities to learn. Until this fundamental issue is addressed, it is doubtful whether the other inputs will deliver all that is expected of them.

5.2 Theme: Terms and Conditions of service

Issue: Salaries

Teachers' feedback, and that of other key stakeholders, indicates that poor salaries are a major factor in determining their motivation and performance. Low salaries have several implications:

1. Teachers do not feel valued as employees and this prevents them from performing key duties, neglecting tasks such as preparation and marking and in some cases not attending classes;
2. Secondly, they must take up out-of-school activities to enable them to support their families, thus distracting them from their 'main' job of teaching;
3. Thirdly, they are not motivated to implement new methodologies and curricula;
4. Fourthly, if they can, they will leave the classroom either to take up posts in school and regional administration, or to leave the teaching profession altogether.
5. It should also be noted that teachers in rural areas feel particularly poorly recompensed given the difficult circumstances in which they work, the range of abilities they find in their classrooms, and the often substandard accommodation available.

Recommendations:

- Increase all salaries to ensure that they are above the minimum required to meet the monthly cost of living in Zambia.
- Introduce a classification system to identify hardship schools and increase salaries for teachers working in such schools.
- Restructure the promotion scheme to enable secondary school teachers to be rewarded for remaining as classroom teachers, with promotion based according to their experience and performance (however, it should be noted that it is not possible to pay teachers according to pupil attainment, due to difficulties in ensuring reliability and comparability of pupils' results). The current system of paying allowances for extra duties could be absorbed or significantly restructured under such a promotion scheme, with teachers higher on the salary scale automatically being given extra administrative responsibilities (see below).

VSO recognises that there are significant constraints on the achievement of these measures due to the fiscal situation in Zambia, especially while the government is unable to allocate the recommended 6% of GDP to education. Two possible measures that could be taken to address the current shortfall are:

- Donors could adjust their current funding conditions, so that as long as Zambia's public finances are insufficient to pay appropriate salaries to teachers, the cost of salary increases can be partly met through donor funding.
- The system of individual allowances (which demands a nationally fine tuned administrative and finance system) is discontinued or significantly downsized. The released funds could thus be used to allow for a salary increase for the whole teacher force, with a sole distinction between salaries payable for posts in hardship schools and those for mainstream schools.

Issue: Accommodation

Accommodation remains a priority concern for teachers. Teachers must have access to accommodation of reasonable quality, based on real, rather than perceived need.

Recommendations

- Establish a national set of criteria against which teachers' housing needs are judged, taking into account family size and proximity to place of work, regardless of gender.
- Increase the knowledge and capacity of communities on ways to access available donor and government funds to provide teacher housing. As long as Education Boards are not in place, PTAs should be trained to gain access to these funds.

5.3 Theme: Management

Issue: Management

Although teachers reported that meeting certain material needs is fundamental in ensuring that they are sufficiently motivated to perform effectively, some teachers also lacked confidence in management structures within and outside school. Specifically, teachers found it demoralising when they perceived that head-teachers were personally unsupportive, when they appeared to make arbitrary decisions about promotions (a particular concern of women teachers, who often felt overlooked) and when they did not deal with poor relations between staff. Furthermore, teachers felt that Provincial and District officials were unsupportive and that the operations of these offices were not transparent and accountable. The DEOs and PEOs acknowledged such feelings, but felt that their perceived shortcomings were a result of inadequate funding and staffing.

A number of other stakeholders identified management of teacher performance as crucial, in order to restore educational values and norms to the teaching profession. Interestingly, a number of teachers cited the decline of inspection services as being demotivating, since it added to their perception that no-one cared about their performance.

Recommendations:

- Offer in-service management training to head-teachers
The current system of promoting classroom teachers to head-teachers not only removes good teachers from classrooms, it also means that some head-teachers do not have the appropriate capabilities to fulfil their management roles. In ideal circumstances, selection of head-teachers should be based not only on their teaching skills, but also on management capabilities. However, since this would appear to be difficult to achieve, head-teachers should also have access to appropriate management training.
- Ensure appropriate funding and support to Education Boards and put in place an intermediate system where the Education Boards have not been established
The general expectations of the implementation of the Education Boards appear to be very high, especially at MOE and donor level. However, learning from the experience of the pilot projects, it is clear that specific measures are necessary to ensure that Education Boards do not encounter similar problems to the DEOs' and PEOs' current situation, such as lack of funding and administrative support. At the same time support to PEOs and DEOs should not be neglected while the focus is on the implementation of Education Boards, especially in the Provinces that are not targeted for Education Boards within the next cycle.

- Once Education Boards are in place, effective disciplinary and grievance procedures for schools should be negotiated with teacher unions. Interventions designed to address teacher needs must be accompanied by further actions to ensure that teachers and head-teachers are accountable for their performance, that mutual respect prevails, and that gross misconduct has appropriate consequences. Much could be learnt from the Mission schools, where a Board monitors teachers' performance and takes appropriate measures if teachers do not function. In particular, the practice of redeploying teachers to rural schools as punishment for gross misconduct must cease.

5.4 Theme: Professional support, development and training

Issue: Ongoing support and training to support classroom performance

A number of teachers acknowledged that their delivery within the classroom is not as effective as it might be. Many teachers reported feeling that their current skills and experience are undervalued and under-utilised, and that they are not supported to meet the challenges of teaching in large mixed-ability classes. While policy-makers favour the introduction of new curricula, methods and materials, teachers can be resistant to such innovation if they feel unsupported and de-motivated. The current approach to provision of in-service training involves releasing teachers to upgrade their qualifications does not adequately address this problem. While this is a positive approach, it cannot be inclusive of the majority teachers, who continue to struggle on in difficult circumstances with little pedagogical support.

Recommendations

- Refresh existing knowledge and capacities through short in-service training courses
Before initiating a new round of innovation in secondary schools, policymakers must first make an urgent effort to recognise and revive teachers' basic methodological skills and commitment to quality classroom practice. The provision of short courses and teacher workshops to allow teachers to share experiences and approaches, as well as providing them with new ideas, would provide an appropriate means to do this, as opposed to the current approach to in-service training, which is both time-consuming and difficult to access.
- Consider methods of reducing ranges of ability within classrooms, such as streaming or setting.
A high pupil-teacher ratio will remain a fact for the foreseeable future as will the intake of a very wide variation of abilities of pupils due to, among other factors, unreliable exam results. To address this problem, policy-makers should consider recommending the streaming or setting of grades according to ability. This will allow for pupils' needs to be met more accurately and improve the working situation of teachers in class.

5.5 Issue: Teacher participation in decision-making

This research has found that teachers' voices are not sufficiently strong in the decision-making processes that determine education policy in Zambia. Participation and involvement of teachers in defining and implementing policy directions is key to ensuring not only that their needs are taken account of and appropriately addressed, but that other educational reforms are successfully deployed, since so much depends on them as the deliverers of quality education.

Recommendations

- The Ministry of Education and donors consult with civil society organisations to establish a clear communication channel to allow teachers to participate in policy dialogue, including, but not limited to, trade union representation.
- The establishment of an Education Forum, as recommended in EFA Declaration of 2000, would assist donors and the government to ensure that 'active participation from the broadest spectrum of stakeholders' is strengthened, as stated in the Education Our Future Policy.
- Review teacher representation on Provincial Education Office Committees and if necessary replace by a more effective mechanism. Education Boards, when implemented on a country-wide basis, should ensure participation of teachers.

Teachers should not be seen as mere 'inputs' in the delivery of quality education. To ensure commitment, motivation and high quality classroom performance, teachers' remuneration, management and professional support must be addressed. Furthermore, it is clear that policy-makers must take account of teacher voice in decision-making and planning to ensure that educational reforms do not founder on teachers' poor perception of their relevance and value in the educational system and society at large.

Appendix 1 – Documents reviewed

Ministry of Education, Zambia	1996	<i>Educating Our Future, National Policy on Education</i> , Lusaka: Ministry of Education
Ministry of Education/DFID	2001	<i>Education Strategic Plan: Situational Analysis</i> Unpublished, document in development
Lungwangwa, Prof.G.	2000	<i>Disadvantaged and sidelined: the plight of rural boarding secondary schools in Zambia</i> . A Study conducted for VSO Zambia
Civil Society for Poverty Reduction	2001	<i>Poverty Reduction Strategy Paper for Zambia</i> . A shadow document.
Frotiers Consultancy Services Ltd.	2001	<i>Report on Short Term Consultancy to Design Technical Assistance to the MOERDC</i> , Ministry of Education, DFID
Ministry of Finance and Economic Development	2001	<i>Poverty Reduction Strategy paper, Education Chapter</i> , unpublished, 0 draft
World Bank	1999	<i>Program Appraisal Document on proposed credit for BESSIP</i>
DFID	1999	<i>Zambia Country Strategy Paper</i> ,

Appendix 2 – Interviewees/focus groups

Schools (focus groups and in-depth interviews)

A summary of the focus group discussions with teacher is presented below under Appendix 4.

Kasempa Boys High School:

Male graduate English
Male diploma English
Focus group 4 females
Headmaster
VSO Volunteer (2)

Kasempa Day High School

Focus group 5 females
Focus group 8 males
Headmaster
VSO Volunteer (2)

Katete Day High School

Headmaster
Male teacher
Male teacher
Focus group 6 males
Focus group with 4 females

Chassa Boarding High School

Headmaster
Focus group 5 Males
Female teacher, maths
Female teacher, English and RE
VSO Volunteers (3)

Katete Boarding High School

VSO volunteer

Mambwe Boarding High School

VSO volunteer

Kalwisha Basic school

Male teacher
Female teacher
Headteacher

TTC college Solwezi

VSO volunteers (1 TOPSSUP)
Headmaster
3 students

Key stakeholders (semi-structured interviews)

Mr. Kaulule	Senior Inspector of Schools, MOE
Mrs. Chilangwa	Deputy Permenant Secretary, TC, MOE
Mr. Chiputa	Co-ordinator, TED, MOE
Mrs.	Ac. District Education Officer, Katete
Mrs.	Inspector, District Education Office, Kasempa
Mr.	Provincial Education Officer , Chipata
Mr. Alan Lingambe	Senior Inspector, Provincial Education Office , Solwezi
Mr.	Senior Inspector, Provincial Education Office, Solwezi
Mr. Sikani,	Education Coordinator, Oxfam, Copperbelt
Mrs. Chilufya	Co-ordinator NWAP, Oxfam
Mr. Muweme	JCTR
Br. Meade	Education Secretary, Catholic Secretariat
Mrs. Kamweneshe	Executive Director, Zambia Community Schools Secretariat
Mr. Siamatowe	Education Specialist, World Bank
Mr. Griffin	Zambia Eduaction Capacity Building programme (ZECAP)
Mr. Arden	Education Sector Development Advisosr, DFID
Mr.Lineham	Education Field Manager, DFID
Prof. Lungwangwa	Directorate researcha nd graduate studies, Univerity of Zambia
Prof. Mwamsa	Dean, Education Department, University of Zambia
Mr. Mwanachingwala	General Secretary, Zambia National Union of Teachers
Mr. Keji Uchida,	Education Specialist, JICA
Mr. Mkandowire	Head Education and Programmes, British Council
Mrs. Chiwela	People's Action Forum
Mrs. Chimuka	FAWEZA
Mr. Kayingwa	PhD. Student, Univerity of Zambia

Appendix 3 Policy Round Table participants

George Mutambo	Primary Education Teachers Union of Zambia (PETUZ)
Andre Irabishojoje	Zambia Community School Secretariat (ZCSS)
Ezekiel Phiri	Japan International Co-operation Agency (JICA)
Allan Lingambe	Senior Inspector of Schools, PEO Solwezi
Kapembwa Musenda	VSO
Shay Linehan	Education Field Manager DFID
Philemon Mwanachingwala Zambia	National Union of Teachers (ZNUT)
Brenda Yamba	VSO Zambia
Jennifer Chiwela	People's Action Forum
Justine Katongo	PETUZ
Catherine Mulenga	DFID
Cosmos Mukuka	PETUZ
Steven Chapman	VSO Zambia

Appendix 4 Summary of focus group discussions

1. The first exercise in the focus group discussions in the high schools was a brainstorm exercise on the following questions:

- *What makes a teacher motivated, makes him/her happy in his/her job?*
- *What features/characteristics does a happy, highly motivated teacher have?*

The following is a summary of the responses, disaggregated by gender.

<p>Male groups:</p> <p>What makes a teacher motivated:</p> <ul style="list-style-type: none"> • good salary • availability of TLMs • exposure to other learning environments • accommodation • transport • allowances on time • (peri) urban placement • good performance of pupils • teaching reasonable number of pupils • discipline in pupils • co-operative parents • transport, • medical care • working under good leadership • friendly teaching load • friendly teachers around him • a school with facilities • respect from society <p>Characteristics of a motivated teacher:</p> <ul style="list-style-type: none"> • punctuality • active in most school programmes • good results • clean classroom • happy pupils • good conduct with other members of staff • smartly dressed 	<p>Female groups:</p> <p>What makes a teacher motivated:</p> <ul style="list-style-type: none"> • availability of TLMs • transport • allowances on time • good performance of pupils • school sanitation • adequate TLMs • good discipline of pupils • co-operation between parents and teacher • well accommodated • good pupil participation • well paid • good school infrastructure (classrooms library, lab, furniture) • good relations with admin <p>Characteristics of a motivated teacher:</p> <ul style="list-style-type: none"> • hard working • happy • pupils do not fear the teacher; she is open • teaches from a wide experience • efficient (prepares her lessons in time) • physical appearance is neat • healthy • knowledgeable • good relationship with pupils • well dressed • always punctual • obedient to authorities • prepares lessons • self-supervised • found at the place of work • interacts well with supervisors • gives more work to the pupils • ready to assist pupils
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2. Teachers then took part in a participatory exercise in which they were asked to give more feedback on the specific factors that affect their motivation. Teachers were invited to group their responses according to the 'source' of demotivation: personal; classroom; in-school; regional administration; national administration. Where more than one teacher cited a factor as significant this is indicated. Following the exercise where they identified the specific factors, the researcher led a discussion to draw out deeper understanding of teachers' working lives.

Male teachers' focus group, Katete Day School	Female teachers focus group, Katete Day School
<p>Personal:</p> <ul style="list-style-type: none"> • Lack of respect from other departmental workers and NGOs • Hunger (2) • Poor accommodation (2) • Family problems (1) <p>Classroom:</p> <ul style="list-style-type: none"> • Not enough desks • Undisciplined pupils (4) • No regard from administration • Lack of teaching materials (3) • Poor selection of pupils • Poor performance by pupils (3) • Negative attitude towards studying in pupils <p>School:</p> <ul style="list-style-type: none"> • Lack of incentives from PTA (2) • Inadequate materials • Complex of some teachers (those who have been in the system long) (2) • Poor infrastructure (2) • Lack of co-operation • Poor school administration (4) • Lack of transparency in financial issues <p>Regional Administration:</p> <ul style="list-style-type: none"> • Intimidating , belittling education authorities (4) • Unrealistic transfers of teachers • Failure to honour allowances/claims • Corrupt, lies (3) • Selfishness • Lack of self confidence • Not paying attention to complaints • Send head-master who are not fit to be leaders <p>National level:</p> <ul style="list-style-type: none"> • Low salaries (4) • Not fulfilling the policy • Failure to sponsor teachers advancement (3) • Unpleasant take away package • Theft of government funds • Poor conditions of service (4) • Political instability • No regard for teachers • Lack of payment of allowances 	<p>Personal:</p> <ul style="list-style-type: none"> • Not enough salary, slave wages (5) • Tend to dislike pupils because of poor performance • Not being put on the payroll on time • Settling in is difficult for newly appointed teachers • Oppression / intimidation by close supervision (2) • Overworked, due to work after school • Forced to share accommodation (3) • Two year teacher training not enough • Broken home <p>Classroom:</p> <ul style="list-style-type: none"> • Lack of TLMS (3), mainly textbooks • High enrolment (2) • No access to educative TV programmes • Curriculum does not respond to rural environment <p>School:</p> <ul style="list-style-type: none"> • Gender discrimination, no promotion (2) • Poor infrastructure • Bad working relation ship with boss • Poor sanitation <p>Regional Administration:</p> <ul style="list-style-type: none"> • No loans to build house • Allowances not paid, or unfairly paid • Recommendation done unfairly • Poor record keeping of teacher files • Inefficient • Corruption • Been posted in areas where different languages are spoken • Not aware of teachers' problems <p>Others:</p> <ul style="list-style-type: none"> • No bursaries for further education • No free education for teachers children , like doctors' children get free health • No freedom of speech • Bad economy

<p>1. Conditions of service were prioritised, including salary and accommodation.</p>	
<p>Male teachers' focus group, Focus group Kasempa Day School</p> <p>Personal:</p> <ul style="list-style-type: none"> • Hunger in the home • Lack of proper training • Poor environment to work in • Poor education for your own children • Quarrelsome spouse because of money • No loan (2) • Uncontrolled drinking habit • Poor accommodation (4) • Water • Walk long distance to school <p>Classroom</p> <ul style="list-style-type: none"> • No desks • Pupils being unprepared • Poor responses to work (3) • No teacher table • Shortage of desks (3) • Age range , from very young to very old in one class. • Undisciplined pupils <p>School</p> <ul style="list-style-type: none"> • Gossip at the workplace • Bad working environment • Lack of co-ordination • School structure • No electricity in the school • Compulsory subjects are not passed by junior classes • Over-enrollment (2) • Supervisors mistake suggestions for complains • Reluctant to react to complaints (admin) • Lack of tlms (6), mainly, books, lab equipment, • Bossy supervisor • Poor infrastructure depilating classrooms, staffroom with only 3 chairs, 2 tables) (3) • Lack of meals in school to keep teacher going. • No in-school incentives <p>Regional Administration:</p> <ul style="list-style-type: none"> • No attention to teachers' problem • Lack of promotion • Lack of incentives (2) • Poor administration; losing papers • Claims for allowances not honoured (3) • The feeling they have of being ' an end in themselves' • No respect for subordinates 	<p>Female teachers' focus group, Kasempa Day School</p> <p>Personal:</p> <ul style="list-style-type: none"> • Poor conditions of service • No proper accommodation • Confusion at home • Broken home (2) • Poorly paid monthly (4) • Cost of living is high. <p>Classroom</p> <ul style="list-style-type: none"> • Not enough furniture • Lack of co-operation among teachers in the department • Undisciplined pupils (5) • Pupil absenteeism • Backwardness of pupils • No facilities for practical subjects like home economics <p>In-school:</p> <ul style="list-style-type: none"> • Poor administration, bad relation with head (6) • Poor teacher accommodation (2) • No recommendations from the headteacher • No furniture, desk and tables (2) • Not give nay responsibility • No furniture in the staffroom • Big workloads (2) • Inadequate tlms (4) • Not respected as female teachers in responsibilities and subject knowledge (2) <p>Regional Administration:</p> <ul style="list-style-type: none"> • lack of understanding of teachers problems (2), poor interaction • not being promoted (5) • no response to allowances (2) <p>National Adminstration:</p> <ul style="list-style-type: none"> • teacher issues not addressed by the govt. • neglected teaching sector • no support from the community • lack of community co-operation <p>Prioritisation</p> <ol style="list-style-type: none"> 1. Conditions of service 2. Good head 3. TLMS

<ul style="list-style-type: none"> • Refusal to give teachers their leave and leave allowance • Staffing shortages • Very pregnant with power • Egocentric (2) • No attention to teachers' problems • No funding <p>National Administration</p> <ul style="list-style-type: none"> • Too low salaries (8) • No consultation on syllabus changes • Allowances just exist on paper (6) • Poor governance • No transport in the ministry <p>Prioritisation:</p> <ol style="list-style-type: none"> 1. Conditions of service, including salary and lack of allowances and loans. 2. Accommodation 	
<p>Chassa Boarding School (Male focus group)</p> <p>Personal:</p> <ul style="list-style-type: none"> • Ill health x 2 • Broken homes • Troublesome wife/husband x 2 • Family trouble through demand on little salary • Sick children • Attitude of others towards learning <p>In-school:</p> <ul style="list-style-type: none"> • Colleagues coming late • Making own programmes, lack of co-ordination between teachers x 2 • Housing • Head who does not take suggestions x 2 • Inadequate facilities • Injustice authorities do not act if there is mismanagement of resources <p>Classroom</p> <ul style="list-style-type: none"> • No interested pupils x 2 • Lack of teaching materials • Over enrolment <p>Regional Administration:</p> <ul style="list-style-type: none"> • Slow process of documentary issues or payments • Failure to assist in tims like books • Failure to recognise effort of teachers • Inspectors not visiting • Teachers not attended to • Endless wait for leave benefits • Disapproving leaves <p>National Administration:</p> <ul style="list-style-type: none"> • Poor salaries x 4 	

<ul style="list-style-type: none">• Poor policy x 4• Late correspondence (e.g. Letters of confirmation)• No or late payments of pensions• Loan facilities missing	
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Appendix 5 Views from other stakeholders

Ministry of Education

Officers of MOE recognise that teachers are demotivated. As main reasons for this they identify low salary, workload and lack of TLMs. Most of the people the researcher spoke to were convinced that giving teachers a salary increase would get them out of the situation of 'remote teaching' into the classrooms. Most people mentioned they had been very occupied with BESSIP and the secondary school had been left 'out in the bush'. The Education Boards were often mentioned as the instrument that will solve many of teachers' problems as accommodation and incentives and even better supervision.

Provincial and District Education Offices

The PEO and DEO represent the Ministry of Education at provincial and District level. From speaking to people in those offices it seemed like they are squeezed between the national plans and the actual delivery of education in schools. Inspectors recognised that teachers are demotivated and feel neglected, but on the other hand expressed their incapacity to do anything about it as they are limited by lack of manpower and transportation. They identified teachers' needs as being TLMs, better accommodation, timely payment of allowances, and more inspection visits.

Academics

Most of the academics spoken to seem to have a very clear picture of what is happening in the situation for teachers in Zambia. They identified the low salaries, lack of provision of accommodation, as well as diminished status respect for teachers as the main reasons for demotivation. In the case of basic teachers they also identified workload, the literacy programme, the new integrated syllabus, the second year students in the school, and the AIEMS project. According to them there are too many changes to handle for the teachers and the managers at the basic level, which leaves them struggling to maintain delivery of basic services. As motivating factors currently happening in the system they see the increase in salary, the courses teachers come to do in the university and the APU, which does motivate teachers to perform good (in the APU classes). In regards to the policy the main issues mentioned are the influence by donors, the 'being forced towards the provision of basic education' as well as the capacity of the MOE. A view that academics seem to share is that focusing on basic education will harm a country as Zambia as to improve on its development higher educated persons are very needed.

As ways to increase the teacher motivation a different promotion path is mentioned, where teachers are promoted *in* the profession instead of good teachers being lifted out of the service into administrative posts.

Catholic Mission

The Catholic Mission runs a large number of schools and teacher training Colleges in Zambia. In speaking to various sources within the Mission the overall opinion was that the morale of teachers in mission schools is much higher than in government schools. According to the spokesman this has to do with several issues, a climate of work, often a cleaner and better cared-for environment, a disciplinary system where a Board has the option of sending teachers back to the government schools in the event of misconduct, and a more intensive monitoring atmosphere. Teachers' salaries are seen as too low, and so to incentivise teachers not to dedicate their time to APU or other activities a small incentive is put on top of the salary. To emphasise the importance of creating a more positive working climate, examples are given of the Community Schools (often started by Missions) where teachers get paid a volunteer allowance and where results are often better than in government schools.

Donors

On the question whether teacher demotivation in Zambia is a problem affecting the quality of education only one of the sources said he did not see the problem to be so much the demotivation of teachers but more the 'fashion of seeing teachers to be demotivated'. All other sources spoken to acknowledged that teachers were demotivated. Reasons for this were seen to be salary, lack of teaching materials, poor training and postings in rural settings.

Almost all informants mentioned that there has started to be an awareness that access to education cannot be improved as long as the quality is not improved, and that thus interventions to increase quality should get priority. Most donors identified initiatives such as improving curriculum, improving training, improving methodology and providing more books to schools as appropriate measures to improve quality of education.

Most donors spoken to acknowledged that secondary education had not yet been the focus of donor attention, but was now to be included in the Education Strategy.

Teacher Unions

Teacher unions seem to be weakened by recent splits, giving them two priorities; how to increase the salary and how to establish a work relationship with the other unions. There seemed to be opportunities for the Teacher Unions that were not exploited. At Provincial Offices teacher union representatives are part of deciding on and advising committees, which could be a way for teachers to participate in local decision-making. However the structure seems to be very weak, especially in communication downwards to District and School level. At the Round Table Discussion both donors as well as the MOE expressed their willingness to have constructive input from the unions, which up till now has not happened. One of the issues that came out of the Round Table Discussion was that the problem of the lack of respect from society is one of the issues to be addressed, a 'Value the Teacher Again' campaign could be initiated by the Unions, the MOE said there would be money for such a action, while VSO said there could be non-financial support like PR, media relations.