

# CHAPTER ONE

## INTRODUCTION

### 1.1 Background to the study

This chapter gives a synopsis of the background to the current study, the statement of the problem, the objectives and research questions of the study. It highlights the significance, delimitations and limitations to the study. It also defines concepts that are used in the study. The chapter also reviews some theories related to the study.

Zambia has been evolving into a new kind of society inspired by democratic values and characterized by fundamental respect for the dignity and rights of all human beings. In the face of grave economic problems, the new society is seeking to ensure increased justice, liberty and equality for all, by facilitating conditions worthy of dignity. This new society is a cooperative and developing venture of individuals and groups in the opportunity to be fully human and each one accepts responsibility for promoting the human development of others (Ministry of Education, 1992:6).

The pace of technological change that many working people have to confront has been accelerating rapidly. ILO (2007:3) purports that,

*A result of this change has been a greater emphasis on continuing education throughout a workers' life. Despite the extended duration of primary , secondary and tertiary education, the knowledge and skills acquired at these levels are not sufficient for a career spanning three or four decades. In many countries, it is no longer possible to train a worker in a single technology at the start of his working life and to expect technology to remain substantially unchanged for years.*

Trotter (2006:8) asserts that, 'In education, change is inevitable. Teachers are constantly learning, growing and adapting to new techniques, new content, standards and new curriculums.'

Kelly (2004: 213) says that the country is evolving into a new kind of society, when he states that,

*the modern technological and economic character of the emerging society is such that individuals within it may have difficulty in acquiring and understanding information, developing the skills and forming the attitudes which will enable them to function in it with satisfaction to themselves. This world is steeped in*

*science and subject to economic forces that are largely out of local control. It is a world that does not offer the security of the past but is one where values are changing, new lifestyles are evolving, and social cultural patterns are being radically transformed.*

Education, just like any other profession, is affected by this tremendous change in the world. The teaching profession has not been spared with new programmes and initiatives that are designed for coping with change. To ensure that the teachers are well vested with the changes, the government and the Teacher Unions need to play a central role in educating teachers. Teachers can only cope with the changing world if they are capacity built. The Ministry of Education (2006:7) is in tandem with this notion when it says, 'Continuous education of workers can bring about efficiency and effectiveness in the work culture of the education system.' Therefore, workers' education is essential in a teacher's life.

Workers' education plays a very important role in the whole field of adult education. It may be concerned with literacy campaigns, or fundamental education with technical vocation. In its most typical form, it is designed to develop the workers' understanding of labour problems. In this, workers' education puts more emphasis on trade unions as the major aspect of this education. In addition, industrial relations, social security, cooperative effort, applied economics and social democracy are part of this type of education. Therefore, training of workers (workers' education), should be a priority, if there has to be development that is related to labour problems in the teaching fraternity. This can be done at two levels; upgrading or updating.

Hugget (1996:162) contends that '*...the main objective of the Trade unions is to look after the interests of their members. Pay is always a major topic of discussion but others include, working conditions, maternity rights, holidays and redundancies.*'

The history of trade unions in Zambia dates back to the time of the start of mining on the Copperbelt. African trade unionism in Zambia was born in 1947. One of the factors that made the colonial government ultimately change its policies of African Trade Union in Northern Rhodesia was because of the African workers' radical reaction to the sharpening antagonism between capital and labour. The consciousness exhibited by African workers during the colonial period, which led them to form trade unions, showed

that they were capable of standing up for themselves as workers to fight for their rights even in a hostile environment. The question now is, “Has the consciousness of workers been lost?” (Friedrich, 2011:3-15).

ILO (1995) posits that the first responsibility of trade unions has always been and must always be to defend the rights and interests of the workers. Although that mandate does not change, the circumstances in which it is exercised, and the definitions by which it is constrained, have to be constantly re- examined. In particular, trade unions have a duty to judge whether public educational provisions in existence or proposed meet acceptable criteria of social justice, as formulated. For example, in the ILO Discrimination (Employment and Occupation) Recommendation, 1958 No.111) *‘all persons should without discrimination, enjoy equality of opportunity and treatment in respect of access to training and employment of their own choice based on individual suitability....’*

Banda (1997) admits that trade unions are important and probably indispensable. However, the question, which immediately arises, is whether the unions have the capacity to sustain themselves and become more relevant to the call of labour as well as the broader interest of the community. He goes on to say that, *“If the notion that trade unions are important is accepted, then the parameters of that importance must be defined in terms of their expected roles and their capacity to fulfill them”* (Banda, 1997: vi).

Zambian teachers in the public sector can choose to be represented by any one of the four teacher unions namely; Zambia National Union of Teachers (ZNUT), Secondary School Teacher’s Union of Zambia (SESTUZ), Basic Education Teachers Union of Zambia (BETUZ) and Professional Teachers Union of Zambia (PROTUZ). This study examined the roles of all Teacher unions except the PROTUZ as it was still in its infancy at the time of the study.

Education is a right. Therefore, in as much as the Government has a mandate to provide it, equally every organization that deals with people should ensure that its Human Resource enjoys this right. Teacher unions, like any other unions, have a role to educate teachers on several issues that pertain to their work, to promote solidarity and action. There are many issues, which dictate that the workforce continually learns. They may include innovations,

change of syllabi or health challenges just to mention but a few. The researcher therefore, found it prudent to find out what role Teacher Unions were actually playing in workers' education.

### **1.2 Statement of the problem**

Most of the teachers, though represented by unions, seem to have little or no access to workers' education programmes like professional upgrading and continuous updating of skills and knowledge. The implications are that teachers may have limited skills or inadequate knowledge about their professional rights and conditions of work. This usually leads to lack of knowledge on the rights and obligations of teachers. It is, therefore, imperative to examine the role of Teacher Unions in workers' education.

### **1.3 Purpose of the study**

The purpose of the study was to establish the roles that Teacher Unions played in the provision of workers' education to teachers in Kafue District.

### **1.4 Objectives of the study**

The study was guided by the following objectives:

- a) to establish the role Teacher Unions play in educating teachers on their conditions of service;
- b) to determine the involvement of Teacher Unions in programmes meant to upgrade teachers;
- c) to ascertain the educational activities offered to teachers on coping mechanisms; and
- d) to establish the involvement of Teacher unions in updating teachers on changes and innovations in the education system.

### **1.5 Research questions**

The following research questions guided the study;

- a) What role do Teacher Unions play in educating teachers about their conditions of service?

- b) How are Teacher unions involved in programmes meant to upgrade teachers?
- c) What educational activities are offered to teachers on coping mechanisms?
- d) How are unions involved in updating teachers in changes and innovations in the education system?

### **1.6 Significance of the study**

The study may make Teacher unions aware of the training needs in the teaching profession. The unions will also be able to identify the gaps that may exist in workers' education that they may be providing.

The findings of the study may also bring out relevant information on the factors that contribute to poor provision and low participation of teachers in workers' education. The information will help Teacher Unions in their planning and implementation of programmes.

The study on the role of Teacher Unions in workers' education is important for establishing the status of workers' education. The Ministry of Education, Science and Vocational Training and Early Education (MOEVTEE) and Teacher unions in general can benefit greatly from the study as the findings can be used to design programmes that are more responsive.

### **1.7 Delimitation of the study**

The study was limited to Kafue District. It sampled teachers, Head teachers and unionists from all the eight Teacher Education Zones in the District.

### **1.8 Limitations of the study**

In order to assess the role of Teacher unions in workers education, the researcher relied more on clues from the unionists' and teachers' responses in the questionnaire administered on them. However, the responses given might not have been a true reflection of what was actually obtaining on the ground. Instead, their theoretical knowledge could have influenced their responses. Unionists could have also based their responses on safeguarding the interests of the union by not being truthful.

At the time of the research, the Professional Teachers Union of Zambia was still in its infancy. As a result, it was difficult to access information from both the unions and teachers, as there was a lot of suspicion and mistrust, thinking the researcher was undermining the activities of the existing unions and promoting the new union and vice versa.

In some instances, the teachers and union representatives held divergent views on certain issues and it was difficult to know which side was telling the truth.

### **1.9 Operational definitions of terms**

Competencies – knowledge and skills that one possesses and can apply them in a specific context.

Educational activities – all participatory activities that are designed to enrich teachers with knowledge and skills.

Labour education - is considered as education conducted by and for the labour movement.

Lifelong learning - all learning activities undertaken throughout one's working life to develop competencies and qualifications.

Role - a set of expectations and behaviours associated with a specific position in a system.

Teacher unions - the four unions representing Teachers' interests in Zambia namely BETUZ, SESTUZ, ZNUT and PROTUZ.

Updating – adding the most recent information to something to make it modern in the way it looks or operates

Upgrading – learning new and modern ways of doing a particular job with a view of changing the official description of a worker to a higher or more important one.

Union education - education to build the effectiveness of unions.

Workers education - education for working people.

### 1.10 Theoretical framework

To understand the present, it is necessary to look back at history. This helps in gaining a great deal of insight into how the field got to where it is today. This section will review some theories related to the role of Teacher unions in workers' education. According to Prasad, Prasad and Satyanarayana (2006:1),

*theory represents a systematic explanation of causal factors and their fusion within conceptual framework involved within an organism. It is a concise presentation of facts and a logical set-up of assumptions from which empirical laws or principles can be derived. It is patterning of logical constructs or interrelated symbolic concepts into which the known facts regarding the phenomenon or theoretical domain may be fitted. A theory is a generalization applicable within the stated boundaries that specify the relationship between factors.*

Schools, where teachers and their unions operate from, are organizations. Different authors define organizations differently. Argyris (1960) takes organizations to be intricate human strategies designed to achieve certain objectives. Simon (1976) regards them as systems of behaviour designed to enable humans and their machines accomplish goals. He further assumes that organizational form must be a joint function of human characteristics and the nature of the task environment. For Stewart (1994) organizations are set up to achieve purposes that individuals cannot achieve on their own. Organizations then, for him, provide a means of working with others to achieve goals likely to be determined by whoever is in the best position to influence them.

Approaches to organizational theory tend to follow the pattern of Classical, Human Relations and Systems perspective. The classical approach puts its focus on the organizational structure and all that is required to sustain it (organizational charts, procedures, communication channels). The Human Relations approach, says in effect, people are the organization. Therefore, it is vital to first, consider issues of group and individual needs before such other issues as structure, authority levels and decision-making. Job enrichment is a typical example of a Human Relations approach to organizational design (Cole, 2004:8).

Teacher unions are expected to promote efficiency in the education system. This can be achieved by promoting guidance to its membership. Unions should therefore, possess managerial and administrative knowledge and skills if efficiency is to be promoted.

### **1.10.1 Classical Theories**

The classical era covered the period from about 1900 to the mid 1930s. The classical contributors include Frederick Taylor, Henri Fayol, Max Weber, just to mention but a few. The classical approach was primarily concerned with the structure and activities of formal, or official, organization. Fayol and Taylor laid the foundations about the organization of people at work and the organization of work itself. While Fayol and Taylor were grappling with the problems of management, a Germany sociologist Max Weber (1841-1924) was developing a theory of authorities of structures in which he identified “bureaucracy”. The distinguishing features of a bureaucracy were a definition of roles within a hierarchy, where job holders, were appointed on merit, were subject to rules and were expected to behave impartially (Cole, 2006:4).

### **1.10.2 Scientific Management**

#### **Frederick W. Taylor (1856- 1915)**

Taylor was born in Boston, Massachusetts, in 1856. Most of his life was spent on working on the problems of achieving greater efficiency on the shop floor. The solutions he came up with were based on his own experience at work. Taylor experienced bitter labour – management conflict particularly between supervisors and workers over the company quantity of output. He was appalled at the inefficiency of workers. Employees used vastly different techniques to do the same job. They were prone to taking it easy on the job. He believed that the workers’ output was only about one - third of what was possible. Realizing that a new industrial scheme was essential to prevent encounters he carried out experiments for more than two decades with a passion of “one best way” to do the job.

According to Robbins, Odendaal and Roodt (2004:436), it is important to understand what Taylor saw at Midvale Steel that aroused his determination to improve the way



things were done in the plant. At that time, there were no clear concepts on workers and management responsibilities. Virtually no effective work standards existed. Employees purposely worked at a slow pace. Management decisions were of the “seat - of - the - pants” variety, based on hunch and intuition. Workers were placed on jobs with little or no concern or matching their abilities and aptitudes with the tasks they were required to do. Most importantly, management and workers considered themselves to be in continual conflict. Rather than cooperating to their mutual benefit, they perceived their relationship as a zero-sum game- any gain by one would be at the expense of the other.

Taylor sought to create a mental revolution among both the workers and management by defining clear guidelines for improving production efficiency. In some experiments, he recognized the need for scientific method of selection of the right personnel for the right jobs considering their initial qualifications and potential for further learning. He wanted effective supervision of a worker and their working conditions after placing the worker in the right place.

Using similar approaches in other jobs, Taylor was able to define “one best way” for doing each job. After selecting the right people for the job, he would train them precisely, in this ‘one best way.’

The object of management according to Taylor is to secure maximum prosperity for the employer, coupled with maximum prosperity for each employee. His philosophy is that there should be no conflict in the interest of employers, workers and consumers. Taylor’s primary concern was that the results of higher productivity should equally benefit all stakeholders involved.

Securing maximum prosperity for teachers should be one of the endeavours of the Teacher unions. Employers must not exploit the teachers and teachers must not be less productive. The unions should ensure that there is no conflict between employers and teachers. There should be harmony and.

Taylor observed that management neglected its functions and shifted its burden to the labour while keeping for itself minor responsibilities. He advised that management

should take the responsibility for determining standards, planning work, organizing, controlling and devising incentive schemes. (Prasad, Prasad, and Satyanarana , 2006; 67).

### **1.10.3 CRITICAL THEORIES**

The early critical theorists were associated with the Frankfurt School. They believed that Marxism had under emphasized the importance of media influences for the persistence of capitalism and that the maintaining conditions of ideological hegemony was important for the intimacy and smooth working of capitalist economic relations. Hegemony is a social condition where all aspects of social reality are dominated by a single class or are supportive of the dominant group interests. From the critical theorist's perspective, some theorists pick up the argument of critical theory, examine issues, and recommend a type of education that will be empowering. Questions of inequality about power, about false myths and opportunities for many students and the way belief systems become internalized to the point where individuals and groups abandon inspiration to question or change their lot in life.

For critical theorists, a critical person is one who is empowered to seek justice and to seek emancipation and change. The agenda of being critical is social transformation. It is a stance that makes critical theorists tend to think of collective action. A critical person for them is one who is empowered to seek for justice and emancipation.

To be critical means to have an attitude of questioning, analyzing and examining the value of something. It is characterised by careful, examination and judgment, challenging the basis of an idea, theory, belief or practice.

#### **1.10.3.1 EDUARD LINDEMAN**

Knowledge derived from experience is the essence of adult education. The worker should seek education because he or she has a reason for personal complaint. It is the field of action, which distinguishes the educational situation from that of a child. To the learning situation an adult brings, guilt, entanglement, want and pain wrapped in experiences of a sort still foreign to a child. A child's education flows with nature whereas the adult's is in conflict with nature as he or she strives for self-mastery. Lindeman (1926:5) contends

that ‘Adult education grows on the graves of those budding dreams, which have not ripened.’

Lindeman views education as potential and action. As a potential, the role of education is to instill innovation, creativity and imagination. As action, the role of education is to increase capacities to act or to be more precise to solve problems. Education must enable people to participate actively through learning by doing and having experience and being able to learn from it.

#### **1.10.4 The Structural Theory**

##### **1.10.4.1 Max Weber (1864 – 1920)**

Weber was a Germany sociologist. He was one of the first to look at management and organisational behaviour from the structural perspective. He described an ideal type of organisation called bureaucracy. Bureaucracy is a system characterized by a clearly defined hierarchy, detailed rules and regulations and interpersonal relationships. Weber recognised that this “ideal bureaucracy” did not exist in reality but rather represented a selective reconstruction of the real world.

The model of legal – rational bureaucracy designed by Weber and derived from his writings, has the following characteristics:

- a) job specialization. Jobs are broken down into simple routine and well defined tasks;
- b) authority hierarchy. Offices or promotions are organized in a hierarchy each lower one being controlled and supervised by a higher one;
- c) formal selection. All organizational members are to be selected on the basis of technical qualifications demonstrated by training, education, or formal examination;
- d) formal rules and regulations. To ensure uniformity and to regulate the actions of employees, managers must depend heavily on formal organizational rules;
- e) impersonality. Rules and controls are applied uniformly, avoiding involvement with personalities and personal preferences of employees, and

- f) career orientation. Managers are professional officials rather than owners of the units they manage. They work for fixed salaries and pursue their careers within the organization;

The above characteristics of bureaucratic organizations enable the authority of officials to be subject to published rules and practices. The authority is legitimate and not arbitrary.

Teacher unions should be aware that government institutions are bureaucratic in nature. They should also be well vested with how bureaucratic institutions function in order to educate the membership on the demands of such institutions. Knowledge of the way the organisation functions helps in increasing production and reduces on conflict and indiscipline among the workers.

#### **1.10.5 Human Relations and Social Psychology Theory**

While classical theories were principally more concerned with the structure and mechanics of organizations, the social psychological theorists focused on the human factor at work. They were interested in people's behaviour in the workplace. They were particularly interested in human motivation, group relationships and leadership.

##### **1.10.5.1 Motivation Theories**

Motivational theorists include Mary Follett, Abraham Maslow, Douglas McGregor, Frederick Herzberg, Chris Argyris and David McClelland. Cole (1995: 119) defines motivation as “the term used to describe those processes, both instinctive and rational, by which people seek to satisfy the basic drives, perceived needs and personal goals, which trigger human behaviour”.

##### **1.10.5.2 Humanistic Theory**

Humanism is a wide philosophical point of view which holds sacred the dignity and autonomy of human beings. The emphasis lies on the freedom and dignity of the individual person. Humanistic adult educators are concerned with the development of the whole person with a special emphasis on the emotional and affective dimensions of the personality (Elias and Merriam, 1980: 109).

Many humanists believe that man is naturally, inherently good. They believe that given, a loving environment and freedom to develop. Human beings can grow in a manner beneficial to themselves and to society in general. Humanists feel that man and societies have continued to strive towards a better society. *'If there were not inherent drive toward good in man,'* they argue, *'it is difficult to understand how the human race could have continued to survive; men would long ago have killed each other off'* (Patterson, 1973:65).

Humanists recognise and value the individuality and uniqueness of each person. They believe that it is important to promote each person's talents and skills and that the potential each person possesses for growth and development is unlimited.

Growth and self-actualization are innate human characteristics according to humanists. Humans continuously strive towards personal growth. Abraham Maslow is popular for self-actualization. He offers a theory of human motivation based on the hierarchy of needs. The needs at the lowest level of the hierarchy are physiological and must be attended to before a person can cope with the safety needs. The next three levels on Maslow's hierarchy are belongingness, love needs and esteem needs. These make one feel useful and that their life is worth. Finally, it is the need for self-actualization. Self-actualization manifests itself in the desire for self-fulfillment, for becoming what one has the potentiality of becoming.

Humanists feel that the individual carries a strong sense of responsibility both to the self and to other people. Individuals have a task of developing their potentialities to the fullest of striving towards self-actualization. In becoming a better person, individuals contribute to the betterment of humanity.

Interaction with others is another important belief for humanists. It is essential to interact with others, because one needs others in order to satisfy drives for love, recognition, and esteem just to mention but a few. The growth of self does not occur in isolation from others.

Humanists view education as *"the development of persons who are open to change and continued learning, persons who strive for self actualization and persons who can live together as fully functioning individuals"* (Elias and Merriam, 1980:122).

Education's assistance in the development of persons leads to a better society. A society of self-actualizing or fully functioning, thinking, feeling, active individuals, will result into the betterment of humanity as a whole.

#### **1.10.5.3 Malcom Knowles**

Knowles was a successful salesperson and promoter of Adult Education in line with his contribution to institutionalization of Adult Education. He packed andragogy and self – directed learning to create self-development. He focused on the problems and situations that were real for learning. He also stressed the role of the environment as it favours or hinders learning.

Knowles' theory can be stated with six assumptions related to **motivation** of adult learning:

1. Adults need to know the reason for learning something (Need to Know);
  2. **Experience** (including **error**) provides the basis for learning activities (Foundation);
  3. Adults need to be responsible for their decisions on education; involvement in the **planning** and **evaluation** of their instruction (Self-concept);
  4. Adults are most interested in learning subjects with immediate **relevance** to their work and/or personal lives (Readiness);
  5. Adult learning is **problem**-centered rather than content-oriented (Orientation); and
  6. Adults respond better to internal versus external motivators (Motivation).
- (<http://www.Instructral design.or/theories/andragogy.html>).

#### **1.10.5.4 Herzberg's Motivation- Hygiene Theory (1959)**

The other theory of motivation is Fredrick Herzberg's hygiene theory on motivation. Herzberg was concerned with what constitutes motivation at actual place of work and not from the general point of view. In his analysis regarding what constituted motivation at place of work, he classified the factors based on what he described as "job satisfiers or motivators and job dissatisfiers or hygiene factors".

In the initial research, 200 engineers and accountants were asked to recall when they had experienced satisfactory and unsatisfactory feelings about their jobs. Following the interviews, Herzberg's team concluded that certain factors tended to lead to job satisfaction, where as others led frequently to dissatisfactions. The factors leading to satisfaction were called motivators. Those giving rise to dissatisfaction were called hygiene factors. Later on, the studies were extended to include various groups and the results were claimed to be quite similar.

Bauleni (2005:66) identifies the job satisfiers or motivators as; achievement, recognition, work itself, advancement and growth while the hygiene factors or dissatisfiers as organization policy and administration, supervision, working conditions, interpersonal relations, salary, status, job security and personal life. A combination of motivators and hygiene factors constitute motivation in a place of work. The study will be based on motivational theories. This is because motivation can influence the direction of workers' education. Teacher unions should know how to motivate the workforce so that they can participate in workers' education programmes and activities. Teacher unions have a role of ensuring that teachers are motivated in a work place. When motivated, the teachers will see the need of participating in workers' education of teachers.

A number of theories related to the study have been discussed in this study. However, the study will employ motivational theories. This is because, a human being is unique with inherit capacity in him or her to choose and be responsible for the development of their full potential. Given the proper environment of learning adults can grow or develop their capacities. For Teacher unions to perform their roles properly in workers' education, they need to understand the theories of motivation. They need to understand the factors that lead to teachers' job satisfaction. Motivation influences the direction of workers' education. Motivated teachers will participate actively in workers' education while de motivated teachers, may not.

Adults who sacrifice leisure and working time to pursue educational activities must have pragmatic reasons for doing so. They should find motivating factors to make them want to learn. There are various reasons that motivate teachers to learn. They may want to learn in order to maintain and sustain social relationships, or to serve others, or to satisfy

a personal interest or to advance their careers or to meet external expectations. Teacher unions should therefore, motivate teachers to express positive expectations as a starting point for workers' education.

It is important for teacher unions to understand that teachers like any other adult learner have different motivating factors or orientations. Some are goal oriented; others are activity oriented and yet others are learning oriented.

Goal - oriented teachers, seek education in order to achieve specific goals. It could be for themselves or for their schools. Therefore, teacher unions must provide adequate workers programmes that can meet the requirements of goal-oriented teachers.

Activity- oriented teachers may also be referred to as social learners. Such participate in educational activities for the sake of social contact. They find satisfaction in learning activities. For example, some teachers may attend Teacher Group meetings (TGMs), subject conferences and workshops to interact with other teachers and avoid isolation.

Learning – oriented teachers enjoy the pursuit of knowledge for its own sake. Teacher unions should be aware of such teachers because if not checked, they will keep on learning without practicing what they have learnt. However, these orientations are not independent or un-related to each other. It can also be an advantage to the unions to design continuous workers programmes within the school

Workers' education will among many other things help teachers experience recognition, achievement and growth as individuals or as workers. On the other hand, lack of or inadequate workers' education may bring about dissatisfaction in teachers. The workplace may experience poor policies, poor administration, poor or lack of supervision, poor interpersonal relations, insecurity and poor personal lives, just to mention but a few. Motivation is a key factor in retraining and continuous professional development of teachers. Therefore, in examining the role of Teacher unions in workers' education, the study will employ motivation theories.



### **1.11 Organisation of the Study**

Chapter 1 presented a synopsis of the background to the topic under study. It also presented the statement of the problem. It further explained the significance of the study with the intention of helping the reader grasp the relevance of the topic, “The role of Teacher unions in workers’ education.”

Chapter two reviews literature related to the study. It has analysed some of the existing literature on the subject of the role of teacher unions in workers’ education.

The discussion of methods of data collection used in the study, are discussed in chapter three. It has seven sections subsumed under the following headings: the research design, study population, sample and sampling procedure, data collection procedure, and data analysis. The collected data is presented in chapter four, while chapter five discusses the findings of the study using the objectives of the research. The sixth chapter presents the conclusion and recommendations based on the major findings of the study.

### **1.12 Summary of Chapter 1**

The chapter showed that the increasing needs for economic development, technological advancement the evolution of social structures and growth of new social institutions have created pressure on teachers. The whole idea is to make teachers better citizens who can contribute to National development. They should be educated continually. Education of workers is the responsibility of educators and unions. It also looked at the Introduction, Background to the study, Statement of the problem, Purpose of the study, Objectives of the study, Research questions, Significance of the study, Delimitations and Limitations of the study. It also looked at the operational definitions, organization of the study and the summary of the chapter.

The subsequent chapter reviews literature that is relevant to the study.

## CHAPTER TWO

### LITERATURE REVIEW

#### 2.1 Introduction

This chapter reviews literature related to the role of teacher unions in workers' education. The role of Teacher Unions in workers' education is cardinal if the education system has to thrive. It is a necessity for Teacher Unions to champion teachers' in-service training programmes meant for both upgrading and updating the workers.

#### 2.2 The concept of education

Various authors have defined education differently. Phiri and Chakanika (2010:10) define education as, "... *the open sesame to culture, wealth, and social prestige and to all that the human heart craves for.*" They also say that it has the role of training the character of a person so that one becomes next to what they are exposed . This therefore, implies that, the more training one gets, the more exposed and knowledgeable they become.

According to Curzon (2001), education in our culture is concerned generally with the handing of beliefs and moral standards, accumulated knowledge and skills. He views it as the nature of human personality and as investment in human capital.

Farrant (2011) on the other hand, contends that two ideas are implicit in the word education. One is that of leading into new knowledge and experience. The other is that of feeding and thereby growing and developing. Both concepts are helpful in understanding that education is an essential process in human development. For instance, the idea that education leads to new knowledge and experience. The idea is very cardinal to teachers just like any other workers. It is common knowledge that the world is revolving and innovations are forever coming into play.

Workers therefore, need to be equipped. Experience is required for one to do their job effectively and efficiently. Education is a universal practice engaged in societies at all stages of development. It describes the total process of human learning by which knowledge is imparted, faculties trained and skills developed.

The second idea above likens education to feeding. Anything that feeds, changes in size. In other words, it grows. The more education one receives the more they grow and develop.

Haddad et al (1980: 4) point out that, “...*formal schooling seems to be necessary for further training: it provides skills in communication...in a modern economy. Educated workers are more achievement-oriented, more self reliant, more adaptive to new situations and above all more trainable.*”

Thus, an organization that invests heavily in the education of its workers in whatever form has a huge investment in human capital and always yields profitable proceeds. Improving the education for workers should be a pre-requisite for developing the human resource base required to meet the changing technological demands. Teacher unions have a role to play in ensuring that there is huge investment in workers’ education. This will not only make the teachers happy but will also raise the standards in the education sector.

According to the theory of human capital, productive abilities depend upon the amount of investment in education, as well as in improved health and training. The Human capital theory is the idea that humans are a factor of production. It focuses on knowledge and skills that a human has. Education is a factor in Human capital because it alludes to a body of knowledge that a person has underlying their physical functions that informs what they do and how they do it. It could refer to any sort of training or human competency (<http://www.google.co.zm/search?q=human+capital+theory&u=utf-8&oe=utf-8&aq=8&rls=org.mozillaen.us.official>).

Loosely speaking, human capital corresponds to any stock of knowledge or characteristics the worker has (either innate or acquired) that contributes to his or her ‘productivity’. Under the neoclassical economic theory, productivity determines earnings. Becker (1964) asserts that, Human capital theory suggests that education or training raises the productivity of workers by imparting useful skills, hence raising workers’ future income and their life earnings. As a result, a better education must generate a higher income.

### 2.3. Right to education

According to the Universal Declaration of Human Rights Article No 26, everyone has the right to education and that education shall be directed to the full development of human personality and to the strengthening of respect for human rights and fundamental freedoms. This declaration does not discriminate. Regardless of how much education one has already received, they are entitled to receiving more. Workers' Education is Lifelong. Lifelong in this sense refers to the workers' working life. There is need to keep on increasing knowledge and sharpen skills in working life. The transformation of occupations necessitates a large-scale effort of further education and retraining of workers. Trade unions must ensure that the legitimate demands for improved productivity are reconciled with workers' rights to education and training as individual human beings and citizens with personal and family responsibilities and democratic obligations.

ILO (1975:75) argues that, it is clear that the right to education is affirmed in the declaration of Human Rights article No 26. It is not merely a question of philosophical principle but a practical matter of growing urgency for many millions of workers. That perception inspired the resolution concerning workers' access to education that was adopted by the 72<sup>nd</sup> session of International Labour Conference in 1986. The resolution stressed the vital impact of the opportunities for and the quality of education on chances for workers to find gainful employment and to participate positively in all aspects of the social and economic life of society. The more educated the better the job. The better the job, the more gainful it is. This entails that even the worker's social and economic standing will be sound.

Lecaillon (1984:88) substantiate the above assertion when they say,

*Education is a factor in determining earnings. That is, in the simplest theory, incomes of individuals rise with the level of education they have received. It has been proved by most of the studies that carried under the World Employment Programmes (WEP) that there is a high degree of correlation between income and level of education. The studies show that education is in many cases the most important among the factors linked with inequality of income.*

Thus, there is a causal relationship established between the personal characteristics of individuals. That is, the supply of labour, and the distribution of incomes. Any modification of the distribution of personal characteristics must therefore, entail a modification of the distributions of income.

Three separate but complementary elements can be distinguished in the resolution. The first is the right of workers and families to share the benefits of education in all its dimensions; personal, cultural and economic. A happy worker will have a happy family. This then translates into a hardworking motivated worker.

Second, the need for workers and future workers, to have access as often as is necessary, to ways of acquiring and maintaining the knowledge and skills that they need to find and hold a job. Just as machines need to be serviced repeatedly, for them to perform well, workers also require servicing, so to say. The servicing meant here is in terms of skills and knowledge. This, among many other advantages, will promote efficiency, proficiency, effectiveness and excellent results in terms of production. The production can be in terms of goods or services. Sticking to initial knowledge without any form of refreshing it can be detrimental, as growth and development are not promoted.

However, workers should not pursue formal education only as a passport to desirable jobs in the modern sector. This may lead to unwise choices, based on over optimism about the availability of jobs in a desired category. This may place the workers on useless escalators at substantial cost in time and money. For one reason or another, workers are educated beyond the requirements of available jobs. This entails great personal disappointment and a misapplication of human resources. This may have an undesirable effect of raising the expectations of employers regarding the educational qualifications of job vacancies whether or not the qualifications are relevant to the job or not (ILO 1995:49-50)

The observation made by the Director General of the ILO at a conference in 1979 remains valid:

*Since the 1960s, there has been a tremendous growth in higher education. This has reflected the higher educational requirements of many*

*professional, technical and managerial jobs as well as the high value that many people have placed on university education and degrees. However, the average educational requirements of work do not seem to have risen at the same rate as average educational attainments. Over time, there has developed in some countries a divergence between educational achievements and employment expectations, on the one hand, and job requirements and employment opportunities on the other (ILO, 1979: ii).*

A balance must be sought with great care. It is useless to train workers for skills that may not be necessary for their jobs. On the other hand, the growth of any organization depends on the existence of an efficient educational system for its workers.

Third, the right and duty of organizations to provide adult education programmes to assist workers face the social consequences deriving from workers' position in society. Workers are adults. They therefore, need programmes that will add value to their lives and make them feel worthwhile. They need to survive and meet their obligations to their families and society. Society has expectations for workers. Any worker who falls below society's minimum expectations for a worker may not be respected. It is then prudent and cardinal that teacher unions educate their workers on societal expectations. Any worker deserves to earn respect. This can only be because of how they carry themselves. Everyone who has undergone through the formal education system has gone through teachers' hands. Teachers are therefore, role models of many; the pupils and community members at large.

The more deeply the status of adult workers is influenced by their education attainment, the more important it is that workers should have clear concepts of human and social development and values which should guide them. Therefore, it becomes necessary that a vision be formed, adopted and sustained collectively by consensus.

Poloni (1986:2) maintains that all the three above are essential for health development of society, human rights, social progress, economic freedom and development in general.

## **2.4 Trade unions and education**

Trade unions have a duty to judge whether public educational provisions in existence or proposed, meet the acceptable criteria of social justice, and whether they provide real and practical possibilities of access by workers to education. In changing circumstances,

unions must consider how they can best equip themselves for participation in the debate on policies and practices, through appropriate programmes of workers' education addressed to leadership and to the general membership. Trade unions must also consider how they might apply their own resources to participation in the effort of non-formal education and training, for the general benefit of the workers and as contribution to national development.

Wong (2000) contends that unions create opportunities for workers' mobility in terms of income, skills and employment status. This involves the design and development of institutions to impart skills, premium skills and ensuring that skill acquisition becomes affordable to workers. The unions should champion the provision. This can be made possible by the teacher unions themselves providing the opportunities or seeking help from the government.

## **2.5 Basic principles of Trade unions**

Trade unions have roles to play in improving access to education. There are principles that guide the roles. ILO (1975:75-76) outlines the principles as follows:

The first principle is the recognition of the link between the general level of education of the population and the goals of the trade unionism. The first purpose of forming trade unions was to give workers the collective strength to combat injustice, to resist exploitation and to demand fair conditions of employment. It is evident that such a purpose calls for a consensus among workers in the first place on what is just and fair, and that no gains can be secure until that consensus broadens to encompass society in general. Progress towards social justice, in other words, requires an evolution of a social climate.

The principal instrument of such an evolution is education, broadly defined, in other words a high level of general education and awareness in the general population. The education that will help people to understand the need and justification for acceptable labour standards is of clear advantage to trade unions in their work. The teacher unions need to educate the workers in trade unionism.

The functions and roles of the Teacher unions must be well explained to the workforce so that there is a shared vision. The workers need to understand that the employers and the unions are not enemies but collaborates whose interest is the welfare of the workers. If this is done, any antagonism that may exist will be reduced.

The second principle is that the aim of defending the interests of workers must be translated into a programme of positive goals. These should define the advantages that are sought for workers. First among these, must be the political and legal recognition of workers' rights. That is only a starting point. Goals must take account of the means by which workers can improve their conditions of life. It is evident that education can greatly improve the economic status of an individual. In other ways, enhance the quality of life, but only if it is appropriate and accessible. Every worker needs to be identified as one. Society usually grades or assesses workers by what resources they have and how they can use them to respond to their own needs or those of their families and at times even those pertaining to communities.

The third principle is that solidarity in pursuit of these goals can be assured only if workers understand the importance. Teamwork is very important among workers if success is to be gained or achieved. A team, according to Adair (1986), is more than just a group with a common aim but one that the contributions of individuals are seen as complementary. Collaboration is the keynote of a team activity.

The fourth and final principle is that the pursuit of these goals can be effective only if leaders possess appropriate skills. In the leadership process, there are key variables that include, the leader, task or goals, group members and the situation or environment.

Cole (2004:53-54) says that the critical and key variable is the leadership role. This role includes; skills, principles, knowledge and personality. It is critical because, using their skills and knowledge, drawing on personal qualities and adhering to principles of integrity and trust; a leader has to make the best of other three variables. Cole goes on to say that, group members themselves may not have the best blend of knowledge and skills. They may need motivating to achieve the overall objective. There will always be issues



of group morale to be considered, as well as needs of individuals. Finally, the situation or environment, both external and internal is important.

Cole (2004: 52) asserts “...*the crux of every management job lies in the job- holder’s capacity to obtain the commitment of people to the objectives of the organization. In other words it means to exercise appropriate leadership*”

The teacher unionists are leaders and managers. Any leader or manager needs to be well vested with what they are leading or managing. They should also seek to increase their skills and knowledge. They must also understand what unionism is; otherwise, it can be a story of one blind man leading another.

The above principles by Cole shape the imperatives for trade union action in relation to education. First, education must tend towards social justice: trade unions must then be concerned about the general goals, policies and effectiveness of education in the society. They must, especially interest themselves in the quality of the social and political education available to their fellow citizens, education addressed to the development of attitudes – respect for human rights, concern for the status of women, commitment to democracy and social justice – and should seek to ensure that it creates a climate in which access by workers to education is a politically accepted aim. The trade union movement cannot afford to stand aside from the effort to influence public policy in these matters.

Second, education confers awareness of rights and obligations, helps people to understand how they can assert and defend their rights. It offers significant chances of improving economic status. Trade unions must seek access to these benefits for their members, bearing in mind that childhood experience heavily influences future possibilities for learning and training, and that a prerequisite for the access of workers to education is determined long before the individual enters the workforce. They must therefore, strive for the provision of a system that permits equitable access to education from the earliest years.

Third, trade union members and leaders must themselves learn the meaning and implications of these goals, and master the skills needed to pursue them. Provision of education in these matters is primarily a task for the unions themselves.

## **2.6 Union Education**

Union Education is the ongoing process by which workers learn how to represent other workers at a work place and in society. The goals to be achieved are determined by workers who discuss their experiences and then express themselves through their representative organizations as they struggle for better lives for themselves, families and the community at large.

ILO (1991:2) asserts that education-involving workers can be divided into three categories. The first category, is union education, which is educational activity conducted by unions for their purposes. It covers functional education (which refers to training members in the operations of their unions) and subject education (which takes general subjects such as economics and applies them to union issues such as globalization or enterprise analysis).

The second category is workers' education, which refers to programmes aimed at the educational attainment of working people. Laidler (1954) as quoted in Phiri and Chakanika (2010:12) contend that workers' education is one that is targeted for workers. They associate the definition of workers' education with the group it addresses, the content and the agency providing it. The two most notable agencies involved in the provision of workers' education are the trade unions and the employers.

The third category is labour studies, which involves the open, impartial and critical study of labour in society, as practised by universities. The term "labour education", is often used to refer to union education and to labour studies when practised by union or university-based educators on behalf of unions. Labour education is a branch of adult education and can benefit from innovations in the field of union education and labour studies (ILO, 1991:2).

Unions can be involved in the delivery of activities in all three categories. They can organize union education, for example, to train health and safety representatives. They can be involved in workers' education by conducting literacy programmes. They can

participate in labour studies to analyze, for instance, the sociological make-up of the working population of a country. Moreover, they can provide sponsorship to enable workers to take up courses which can offer them knowledge and skills relevant to their jobs. It is important to recognize that unions can be involved in the whole continuum: from union education to workers' education to labour studies. The emphasis a union places on each will depend on the make-up of its membership, its goals, its resources, and the economic structure of the country (ILO, 2007: 2).

The International Confederation of Free Trade Union (ICFTU) (1991) states that;

*... trade union education is not an end in itself, but one of the steps in the advance towards emancipation of mankind. The goal would be reached only when broad masses of the workers and those representing them are in possession of all the knowledge and experience necessary to change the structures of society and to banish want and fear forever.*

## **2.7 Union Education and Lifelong Learning**

ILO (1991:276-279) recognizes lifelong education as a human right for every worker regardless of the type of work the individual is engaged in. It is within this context of lifelong learning, as a human right that union education is situated. It is simultaneously a way of building unionism and part of the struggle for decent education for workers. Labour organizations are committed to both union education (education to build the effectiveness of unions) and workers' education (which focuses more on the general education of working people).

The International Trade Union Confederation (ITUC) (1988:17) establishes that,

*...it is the responsibility of governments to guarantee the right to education. And that making lifelong education a reality for all is the key to participation in the knowledgeable society'. It affirms that vital public services, notably education, must be excluded from negotiations on trade liberalization with governments retaining the right to regulate and to protect the public interest. When it comes to issues of trade unions, it is even more specific as it proclaims that trade union education is a vital instrument for building the capacity of trade unions and their members to enable them to improve and strengthen their organizations and to play a constructive, purposeful and creative role in their workplaces and societies.*

Paterson (1979) in Elias and Merriam (1980), appreciates the right and duty of adults to pursue lifelong education. His treatment is thorough and balanced. After analyzing such concepts as justice, rights and duties, Paterson discusses the right of adults to education. Based on the individual's right to deepen knowledge and develop personality, Paterson concludes that individuals have both rights and duties in pursuing lifelong education. He further contends that adults are entitled to a share of educational resources. He believes that every individual adult does have a right to some appropriate share. Neither more nor less than that share, of whatever overall resources a society finds that it can reasonably devote to the business of promoting the education of adult members.

## **2.8 The worker**

According to the ILO Director-General's opening paragraph in the report to the General Conference of 1980 as quoted in ILO (1984:ii),

*People are the wealth of nations. Such self-evident truths are unfortunately forgotten, and therefore, bare repetition. People intervene in the development process of their communities in two ways: by contributing to and acting as factors of production and by constituting the very purpose of development. Without people, land would remain uncultivated, natural resources untapped, machines would remain idle and services would be neither needed nor rendered. Yet people are not mere tools producing goods and services. They are above all human beings who have the right to live a decent life.*

Jose (2006), in ILO (2006), gave the following guidelines on Human Resource Development as contained in convention No 142 of 1975 (to which Zambia is a member) : each state which ratifies the convention has to adopt and develop policies and programmes of vocational guidance and vocational training, closely linked with employment, in particular, through public employment services. It further states that, these policies and programmes must; take account of employment needs, opportunities and problems, enable all persons, without discrimination to develop and use other capabilities for work in accordance with their own aspirations. For this purpose, each state, party to the convention, has to (among others), establish and develop systems of general, technical and vocational education, vocational guidance and vocational training. Gradually, each state should extend, adapt and harmonize its vocational training systems

to meet the needs for vocational training throughout the life of both young persons and adults in all sectors of the economy and at all levels of skill and responsibility.

ILO (2004) made recommendations for Human Resource Development in Recommendation No 195. The recommendations contain guidance for members on how to formulate, apply and review national human resources development, education, training and lifelong learning policies that are consistent with economic, fiscal and social policies as part of the approach to social dialogue. The other recommendation is that members should recognize that education and training are a right for all, and that lifelong learning should be work based. This can be achieved by government and trade unions investing in, and creating conditions that enhance education and training at all levels, by enterprises, to train their employees, and by individuals to develop their competencies and careers (ILO, 2006: 4).

UNESCO (1990) observes that teachers are at the centre of the educational process. Improvement in the quality of education requires measures to attract talented recruits; sound selection; effective pre-service education and training; measures to maintain the competence of serving teachers; and attention to teacher morale and motivation.

The recommendation concerning teachers, adopted at a special inter-governmental conference called by UNESCO in 1966 after extensive preliminary work by that organization and the ILO, and monitored by a special joint committee of experts appointed by both bodies, gives extensive treatment to these matters. The study of the recommendation, and of its application in the various countries, should be a regular topic for workers' education, especially that organized by Teacher' Unions. In-service education has provided a fruitful field for international cooperation among teachers' organizations, directed to improving teachers' knowledge of subject matter and of child and adolescent psychology, to development of teaching skills and approaches, to production of low-cost materials, and to the encouragement of innovative methods.

## **2.9 The purpose of training**

Under favourable circumstances, training has the important dual function of utilization and motivation. By improving employees' ability to perform the tasks required by the

organisation, training allows better use to be made of human resources; by giving employees a feeling of mastery over their work and of recognition by management, their job satisfaction is increased. When circumstances are unfavourable, these results may not be obtained for example, when the trainee does not see any purpose in the training, when it is regarded as a punishment or sign of displeasure or when the training seems irrelevant to the trainees needs.

The gains of training include; greater productivity and quality, greater versatility and adaptability to new methods, less need for closer supervision and greater job satisfaction which may manifest itself in less absence, just to mention but a few.

## **2.10 Reasons for training**

Although training is a routine, for example, training new employees in certain courses, more often it is given as a response to some event, for example, change in working methods, a realisation that a performance is inadequate, labour shortage, necessitating the upgrading of some employees, a desire to improve quality and promotion or transfer of individual employees. Without careful planning or supervision, training can be very wasteful. Without logical approach, some training may be given which is not necessary or the extent of the training may be too small or too great (Graham, 1986: 182-183).

## **2.11 Training in skills**

The Department of Employment's Glossary of Training Terms of Training Terms as quoted by Graham (1986:195) gives the following definition of a skill;

*An organized and coordinated pattern of mental and/ or physical activity in relation to an object or other display of information, usually involving both receptor and effector processes. It is built up gradually in the course of repeated training or other experience. It is serial; each part from second to second is dependent on the last and influences the next. Skills may be described as perceptual, motor, manual, intellectual, social, etc., according to the context or the most important aspect of the skill pattern.*

More briefly, a skill may be defined as a practiced, expert way of perceiving a relevant stimulus and then responding to it. Skills training therefore, comprises of stimuli, appropriate responses and establishing serial performance. The traditional method of

training in skill is usually known as ‘sitting next to Nellie’ (i.e. the trainee is told to watch and copy an experienced worker. The disadvantage of this method is that if Nellie uses poor working methods or if the job includes much that cannot be understood simply by observation, then the method is a bad one. However, the advantage comes in when Nellie uses good methods and if the job can readily be understood simply by observation. This is because the method becomes effective and economical.

## **2.12 Training in Knowledge**

No employee can work well without sufficient or adequate job knowledge. Knowledge is required for the purpose (function of the job), background information (history and policies), quality standards, materials of work, tools and equipment, technical information, personal contacts, and procedures. Knowledge can be imparted through inexpensive and convenient methods like, coaching, formal lectures, visits and tours, manuals and charts, simulations, simulation, in-tray ( dealing with miscellaneous documents that are put in the employees tray) and programmed learning (Graham,1986, 199-202).

## **2. 13 Vocational Training**

According to Dunning (1984:3), vocational training is defined as all competencies which enable workers of any category to improve, vary, extend or maintain their competencies. This then implies that vocation training is a lifelong process which begins with basic education and does not end until the worker retires at the end of his or her working life. It focuses on every worker

Some objectives were agreed upon in 1919. Technical was the organization of vocational education. After many years of experience, the objectives were clearly restated in the Declaration of Philadelphia (1944) as quoted in Dunning (1984:3) included the following;

*The employment of workers in the occupations in which they can have the satisfaction of giving the fullest measure of their skill and attachments... and therefore, the provision of facilities for training. In summary, the objectives are concerned with the development of the worker as a person and the development of society based upon the total contribution of its members.*

## **2.14 The concept of workers' education**

According to Kakkar (1973), workers' education is an attempt on the side of organized labour to educate its members under the education system in which workers prescribe the course of instruction, select teachers and furnish the finances. While Morgan (1989) contends that workers' education is an educational programme that is practical and concerned with the daily needs of the worker at work and outside their workplace. Workers' education avails workers with the training they need to perform an effective role in the economic and social life of their societies.

Workers need to develop professionally. Leach (1996) contends that, development in education is a career-long process. It is not a single event, or a course of study. Though both may form a part of the overall process rather, it is a continuum: a complex, often uncertain but potentially creative journey from the earliest stages of initial teacher education, through to the latest stages of being an educational professional. For, if professional development is about real change, it can only realistically take place over time and in the context of continuity of personal goals and aspirations as well as institutional purposes. It will almost, always include periods of supported training, study or research. For real professional growth, however, there must be a direct relationship between such education and practice itself. Professional development is also essentially a social as well as a personal practice.

The OECD (1977:7) points out that;

*Inequalities in education, employment, income, social status and mobility are interconnected...there is need for an ensemble of measures in education and employment policies to reduce inequalities and poverty. Action in education alone may remain ineffective if it is not complemented by measures to improve opportunities throughout working life, and the effectiveness...measures to improve opportunities depends on improving the education and training of the least well- prepared members of the current potential labour.*

## **2.15 Categories of workers' education**

International Confederation of Free Trade Unions (1998) suggests the existence of three categories of workers' education under the aegis of trade union movement. First, education aimed at a general improvement in the condition of society. Trade unions



organize it because they possess appropriate and are appropriately motivated. Second, education of workers on topics which the trade unions consider important, and which are unlikely to receive attention in non formal education system – such as labour history and the rights of workers. Third, education for union leaders and members, related to the exercise and development of trade union functions.

## **2.16 Provision and support for workers' education**

The international Confederation of Free Trade Unions (ICFTU) (1988 17-18) has declared that:

*A well trained, informed and active membership, combined with a skilled resourceful, responsive and democratically supported leadership is the best means by which to ensure the growth and effectiveness of trade unions prepared to meet the challenges of the future... Trade union education must increasingly address emerging complex issues, such as the growth of new technologies, new patterns of work and occupational health and safety concerns. It needs to respond adequately to the needs of special sectors of the workforce...Such home- based workers, and especially in developing countries, rural workers.*

From the above, it can be said that the role of trade union leaders and officials is to perceive, define and defend the interests of workers and the specific skills of doing so do not change. The topics do change. This affects the nature of knowledge required and the approach to its accumulation, analysis and organization.

## **2.17 The role of teacher unions in educational policies**

Robbins et al (2004:179) define a role as, *a set of expected behaviour patterns attributed to someone occupying a given position in a social unit.*

Teacher unions like any other trade union, have an essential duty and roles to play in the economic and social interests, the health and safety of their members, and to insist on conformity to international norm. That defense now requires strategies. Teacher unions have to help workers map out the strategies.

Technological changes have deeply affected employment levels, the career prospects of workers, the basis of upgrading, and the possibility of self- development. The systematic re- education and training of workers based on their developmental needs and the

national interest rather than on the employer's concept of short- term profitability, demands a high place on the agenda for negotiations. It must also be given due attention on the political agenda. Unions must be prepared to raise questions about the policies and methods of development

In other words, unions must assume important responsibilities towards the general workforce. This is because they are organisations that possess important human resources and should be dedicated to human and social progress. They must show interest and dedication to improving the conditions of life of all their people.

The importance of educational policies in national development and the lives of individual workers have special implications for teachers' unions. In developing countries, where as a general rule, the members of industrial trade unions are only a small minority of working population, and have little presence outside the towns; Teacher Unions have a special responsibility to take. They have to play an active role. This is because their members are found in every corner of the country, and have skills that are particularly applicable to the tasks of community development.

ILO (1995:78) contends that Teachers' organizations should be recognized as a force which can contribute greatly to educational advance and which therefore, should be associated with the determination of educational policy.

Bauleni (2005:146) identifies three types of school management attitudes towards teacher unions.

The first type of managers or administrators are those who think that institutions would run better if there were no teacher unions and that managers should be left alone to get on with the business without teacher unions.

The second type is that of those managers who take a neutral view. They can work with or without the unions. They do not bother about the existence of a trade union in the institution.

The third and final category comprises those managers who take a positive attitude and recognise the existence of trade unions and they support and co-exist with them.

The unions have to deal with the negativity of the first two types of managers or administrators. Industrial harmony cannot be expected in institutions led by them. The unions have a role to make such people understand that teacher unions legally exist, so that harmony can be brought about. However, the third type of managers or administrators create a good and fair play ground for both parties. There is collaboration in planning and resolving conflicts that may arise along the way.

Where this negative attitude occurs, it is the role of the union to find out why the situation is as such. Bauleni (2005:147) identifies some reasons as to why this negative attitude may arise. They include; fear of confronting union representatives on labour matters; confrontational attitude towards those who seem to provide parallel authority in the institution; arrogance and or selfishness on the part of managers – feeling that they are above everyone else; too much authority or power; limited understanding of management or administration responsibilities; wrong perception about the role of trade unions; inclination towards maximization of profit; reluctance to discuss issues with other people; professional bias- never concerned about other sectors of managerial responsibilities; lack of training or information in union matters; and dictatorial tendencies.

The unions must then formulate and execute educational programmes that can counteract the indifferent attitudes. They can also provide literature on unionism for sensitization. In addition, the unions have a role to advocate for partnership in the running of institutions.

However, it is not all rosy for unionists. There are also unionists who feel by virtue of their office, they are equal or even above administrators. They do not lead by example. Instead of guiding the teachers, they end up misleading them. This usually emanates from union members learning on job. ICFTU (1994:134) substantiates this scenario when it says;

*Union staff members are often expected to learn on job. The result is that many union staff members are inadequately trained in the basic functional aspects of the union and unable to respond to new challenges posed by phenomena such as globalization. The lack of staff training is especially serious for women staff members. Men usually enter union staff jobs after long periods of volunteer activity and so are aware of basic procedures and operations. Women, however,*

*often, cannot readily participate in volunteer activities because of family responsibilities and so as staff members, they are often at a disadvantage. To make matters worse, there are fewer women among the staff of unions and consequently there are fewer opportunities to meet and be trained by co-workers experiencing similar problems. Staff members need not only initial training but lifelong education as well.*

The unions should not take an antagonistic stance in addressing conflict or dealing with the managers. The managers are also workers and in most cases contribute to these same unions. It, therefore, goes without saying that those in management deserve the unions' incentives just like the ordinary workforce do. Both parties should realize that they are partners in development of the education system.

## **2.18 Learning organization**

Graham (1986:29) defines learning as '*a relatively permanent change in the repertoire of behaviour occurring as a result of experience.*' This definition implies that learning can only be said to occur when a person shows different behaviour, for example, when they can prove the knowledge of new facts or do something they were not able to do before.

The following terms according to Graham (1986:31) are important when dealing with learning;

- a) Drive – the necessary condition of arousal or readiness for action or behaviour to begin. It is a condition in which a person wishes to satisfy a need.
- b) Stimulus - the cue or signal which initiates a response .
- c) Response – the behaviour which is as a result of stimulation (though it may not be possible to identify a stimulus).
- d) Reinforcement- any event or object that strengthens a response, by causing it to continue or increase when a reward is given.

Workplaces are supposed to be learning organizations. Senge (1990:3) describes learning organizations as '*organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together.*'

Cole (2004: 359) associates a learning organization to one, which sees that learning, training and development are best achieved by collaborative efforts. Everyone from top to bottom is expected to reflect on present practices, suggest better ways of doing things and collaborate with others to achieve improvements. Learning in this sense means that all levels and grades of staff are developing their capacity to acquire new skills and insights into the way their duties must be fulfilled.

Cole goes on to say, whilst some collective issues are still handled by national bodies, such as unions and employers' associations, the majority of these matters are dealt with in the work place. In organizations where one or more trade unions are recognized for the purposes of bargaining and /consulting on behalf of the employees, it is usual for workplace representatives to be appointed by the union members. Such representatives are employees of the organization. They fulfill unpaid work on behalf of their trade union colleagues within the frame work of rules agreed between the two parties – employer and the union. The work of the representative usually includes the following responsibilities; negotiating local conditions, where appropriate agreements exist for enabling them to do so; dealing with members' problems in respect of pay, hours and other relevant conditions of employment; representing members in the course of a grievance; monitoring the implementation of agreements with employers; acting as a communication channel between members and the employer on relevant matters; contributing to joint discussion on workplace safety, efficiency just to mention but a few. They act as a link between the trade union and its members.

## **2.19 Summary of chapter Two.**

Literature has shown that everyone has the right to education and that education shall be directed to full development of human personality and to the strengthening of respect for human rights and fundamental freedoms (ILO, 1986).

Research as indicated by Trotter (2006) has shown that the increasing pace of technological evolution in every kind of occupation imposes the need to for training as a continuous activity. It is essential to economic development, for example, teachers need to adapt to innovations in teaching. All these depend on the availability of regular

refresher courses and training in new techniques for workers whose initial educational level was relatively high (ILO, 1995).

In the changing circumstances, unions must consider how they can best equip themselves to participate in the debate on the policies and practices. They should also create appropriate programmes of workers' education addressed both to the leadership and to the general membership. They must also consider how they might apply their own resources to participation in the effort of non-formal education and training for the benefit of the workers and as a contribution to national development.

The discussions above show that, Teacher Unions have a very important role to play in workers' education.

The next chapter presents the research methodologies used to collect data and the processes used for data analysis.

## **CHAPTER THREE**

### **METHODOLOGY**

#### **3.1 Introduction**

This chapter describes the methods applied in carrying out the research study, “The role of Teacher Unions in the provision of workers education”. It explains the target population, research instruments used for data collection, data collection procedures and data analysis of the study.

#### **3.2 Research design.**

Bryman (2004:27) explains that a research design provides a framework for the collection and analysis of data. A choice of research design reflects decisions about the priority being given to a range of dimensions of the research process. For Kombo and Tromp (2006:70), ‘...it is a structure of research or the ‘glue’ that holds all the elements in a research project together.’ A design is used to structure the research to show how all the major parts of the research project work together to try to address the central research questions.

Bless and Achola (1988:54), explain that, ‘...a research design has two meanings. It can be understood as the planning of any scientific research from the first to the last step. In this wide sense it is a programme to guide the research in collecting, analyzing and interpreting observed facts.’

This study used a case study design. This design was employed to help the researcher gain an insight into the role of Teacher Unions in Workers’ Education programmes. ‘A case study design seeks to describe a unit in detail, in context and holistically. It is a way of organizing educational data and looking at the object to be studied as a whole’ (Kombo and Tromp, 2006: 72).

Stake (1995) observes that, case study research is concerned with the complexity and particular nature of the case in question.

Basing on the above discussions, the researcher used the case study design for obtaining in-depth information and subjective feelings from the respondents. The theory that will be established from the study will be a grounded theory.

The case study was conducted in a natural setting. Descriptions of events and activities in relation to the role Teacher Unions play in workers' education in Kafue District were captured. The natural setting, in this context, refers to work related activities or things happening in the schools every day without any artificial interference.

The study employed both quantitative and qualitative approaches. This allowed the researcher to triangulate data. Triangulation entails using more than one method or source of data in the study of social phenomena. The term has been employed somewhat more broadly by Denzin (1970:310) to refer to *“an approach that uses multiple observers, theoretical perspectives, sources of data and methodologies, but the emphasis has tended to be on methods of investigation and source of data;”* while Deacon et al (1998:147-163), asserts that, *“...triangulation represents just one way in which it may be useful to think about the integration of these two research strategies.”*

According to Bryman (2004:542) *‘...Qualitative research usually emphasizes words rather than quantification in the collection and analysis of data while quantitative research usually emphasizes quantification in the collection and analysis of data.’*

### **3.3 Universe Population**

Sidhu (2006: 253) defines a population *‘...as an aggregate or totality of objects or individuals regarding which inferences are to be made in a sampling study.’* It means all those people or documents, which are proposed to be covered under the scheme of study. For Kombo and Tromp (2006), a universe population is the entire group of persons or elements that have at least one thing in common.

In this study, the universe population consisted of all union officials, teachers and head teachers in Kafue District. This population was chosen because the study was aimed at establishing the Role of Teacher unions in workers education.



### 3.4 Sample Size and Sampling Procedures

Lucey (2007:84) defines sampling as ‘...*the process of examining a representative set of items (people or things) out of the whole population or universe. The purpose is to gain an understanding about some feature or attribute of the whole population based on the characteristics of the sample.*’ While Orodho and Kombo (2002), quoted in Kombo and Tromp (2006:8) say, *sampling is a procedure a researcher uses to gather people, places or things to study. It is a process of selecting a number of individuals or objects from a population such that the selected group contains elements representative of the characteristics found in the entire group.* The sample included 10 Head teachers, 30 union officials and 60 class teachers. These were from both Primary and Secondary schools.

Purposive sampling was used to gather information from the Head Teachers and unionists. This because samples were to be got from all the Zones in Kafue District. According to Kombo and Tromp (2006; 82), *in this sample method, the researcher purposely targets a group or people believed to be reliable for the study.* Bryman (2004:333) contends that

*...purposive sampling is essentially strategic and entails an attempt to establish a good correspondence between research questions and sampling. In other words, the researcher samples on the basis of wanting to interview people who are relevant to the research questions.*

The research focused on three distinctive classifications of respondents. It focused on the Head Teachers, teachers and union representatives. These categories of respondents were important as they provided the researcher with relevant information about the role Teacher unions play in workers’ education.

In order to select the sample teachers from the universe population, the study used a simple random technique. The simple random sample is the most basic form of probability sample. With random sampling, each unit of the population has an equal probability of inclusion in the sample. It is important to appreciate that, probability sampling does not and cannot eliminate sampling error. However, probability stands a better chance than non-probability sampling of keeping sampling error in check. Moreover, probability sampling allows the researcher to employ tests of statistical

inferences to be made about the sample from which the sample was selected (Bryman 2004:90).

For each school that was sampled, staff registers were used to get the sample population. Every teacher was assigned a number and then the sample was selected from a table of random numbers. For example, in one school which had 50 members of staff and the required sample was 10, every fifth teacher was picked. However, in a school with 20 members of staff, every second teacher was picked to get the same sample of 10.

### **3.5 Data Collection Procedures**

According to Merriam and Simpson (1995) data collection refers to the process of finding information on research. Data were collected by the use of self-administered, semi-structured questionnaires. A questionnaire is a form prepared and distributed to secure responses to certain questions. It is a device for securing answers to questions by using a form which the respondent fills by him/herself. It is a systematic compilation of questions that are submitted to a sample population from which the information is desired. (Sidhu, 2006:131).

The other technique that was used was content analysis of documents (examining relevant documents).

### **3.6 Data Analysis**

Sidhu (2006:274) says, the analysis and interpretation of data involve the objective material in the possession of the researcher and his or her subjective reactions and desires to derive from the data the inherent meanings in their relation to the problem.” Bare facts, objective data, never determine anything. They become significant only as interpreted in the light of accepted standards and assumptions, and these standards in the final analysis are not susceptible to scientific determination. In ordinary life, we seldom deal with bare facts but facts interpreted. This interpretation or evaluation is determined by the purpose to which we relate the facts.

In this study, qualitative data were coded using themes that emerged while the quantitative data were presented, analysed and interpreted using frequency tables and percentages.

### **3.7 Ethical Considerations**

Discussions about ethical principles in social research, and perhaps more specifically transgressions of them, tend to revolve around certain issues that recur in different guises but that have been usefully broken down by Diener and Crandall (1978) into four main areas: whether there is harm to participants; lack of informed consent; invasion of privacy; and whether deception is involved.

The study ensured that the participants were neither harmed nor exposed to any harm. Harm can entail a number of facets: physical harm, harm to participants' development; loss of self esteem; stress and inducing subjects to perform reprehensible acts (Diener and Crandall (1978:19).

Informed consent was sought from the respondents to show willingness for participation in the study. No participant privacy was invaded. All participants who felt they should withdraw were accorded that right.

### **3.8 Summary of Chapter 3**

The chapter discussed the research methodologies which were used in the study on the Role of Teacher Unions in workers' education programmes. The study engaged a case study design. This design helped in carrying out an in-depth study. The sample size was 100 respondents. Self administered questionnaires were used to collect data. Qualitative data were \ presented using generative themes, while the quantitative data were presented, analysed and interpreted using frequency tables and percentages.

The next chapter will describe the findings of the study. These will give information that the researcher gathered in the field.

## CHAPTER FOUR

### PRESENTATION OF FINDINGS

#### 4.1 Introduction

This chapter is a presentation of the findings of the study conducted in Kafue District on the role of Teacher Unions in Workers' Education in Kafue District. The findings are presented as obtained from teachers, Head Teachers and Teacher Union representatives at school and district levels, through questionnaires and are illustrated by the use of frequency distribution tables.

It is imperative to remember that this research aimed at finding out the role of Teacher Unions in Workers' Education. The following research questions guided the study:

- a) What role do Teacher Unions play in educating teachers about their conditions of service?
- b) How are Teacher unions involved in programmes meant to upgrade teachers?
- c) What educational activities are offered to teachers on coping mechanisms?
- d) How are unions involved in updating teachers in changes and innovations in the education system?

In this study, three categories of respondents from 10 schools participated. These were 60 ordinary teachers, 19 unionists and 8 Head teachers, making 89. The target number was hundred from 10 schools. All the 60 teachers from the 10 schools responded. Only 19 unionists out of the targeted 30 responded. This was because some schools did not have the school union representatives. Two Head teachers chose to withdraw from the study.

#### 4.2 Findings from teacher participants.

**Table 4.2.1: Teachers by gender.**

<b>Gender</b>	<b>Frequency</b>	<b>Percentage</b>
Male	30	50 %
Female	30	50%
<b>Total</b>	<b>60</b>	<b>100%</b>

Table 4.2.1 above shows that 30 (50%) were male and the other 30 (50%) were female. Therefore, the study had equal representation of both male and female teacher respondents.

**Table 4.2.2: Teachers by length of service.**

<b>Period of service</b>	<b>Frequency</b>	<b>Percentage</b>
1-10 years	33	55%
11-20 years	18	30%
21- 30 years	9	15%
<b>Total</b>	<b>60</b>	<b>100%</b>

Table 4.2.2 above shows that 33 (55%) were in service for 1- 10 years, 18 (30%) were in service for 11-20 years, while 9 (15%) were in service for 21- 30 years. The study established that the majority 33 (55%) of the teacher respondents were in service for 1-10 years.

**Table 4.2.3: Whether or not teachers belonged to any Teacher Union.**

<b>Union</b>	<b>Frequency</b>	<b>Percentage</b>
Yes	52	86.7%
No	8	13.3%
<b>Total</b>	<b>60</b>	<b>100%</b>

As evidenced in table 4.2.3 above, 52 (86.7%) belonged to a Teacher Union while 8 (13%) of them did not belong to any Teacher Union. The study established that the majority 52 (86.7%) of the teacher respondents belonged to a Teacher Union.

**Table 4.2.4 Teachers' union membership.**

<b>Union</b>	<b>Frequency</b>	<b>Percentage</b>
BETUZ	9	15%
SESTUZ	9	15%
ZNUT	33	55%
PROTUZ	5	5 %
NONE	6	10 %
<b>TOTAL</b>	<b>60</b>	<b>100%</b>

The study in table 4.2.4 above revealed that 9 (15 %) of the teacher respondents belonged to BETUZ, another 9 (15%) belonged to SESTUZ, 33 (55%) belonged to ZNUT, 4 (6.7%) belonged to PTUZ, while 6 (10%) did not belong to any union. The study established that the majority 33 (55%) of the teachers belonged to ZNUT.

**Table 4.2.5 Teachers' Professional upgrade.**

<b>Have you ever upgraded yourself professionally?</b>	<b>Frequency</b>	<b>Percentage</b>
Yes	45	75%
No	15	25%
<b>Total</b>	<b>60</b>	<b>100%</b>

In table 4.2.5 above, 45 (75%) upgraded professionally while 15 (25%) never upgraded themselves professionally at all. The distribution revealed that the majority 45 (75%) of the teachers upgraded their knowledge and skills.

**Table 4.2.6: Sponsors for Professional upgrade.**

<b>Sponsor</b>	<b>Frequency</b>	<b>Percentage</b>
Self	42	82.4%
Union	1	2.0%
Government	3	5.9%
Others	14	9.8%
<b>Total</b>	<b>60</b>	<b>100%</b>

Table 4.2.6 above indicates that 42 (82.4%) teacher respondents sponsored themselves, 1(2%) was sponsored by a teacher union, 3 (5.9%) were sponsored by the government while 14 (9.8%) were sponsored by others. The study therefore, established that the majority 42 (82%) of the teachers sponsored themselves for further training.

**Table 4.2.7: Highest qualification attained by teachers.**

<b>Highest qualification</b>	<b>Frequency</b>	<b>Percentage</b>
Certificate	17	27.1%
Diploma	31	52.5%
Degree	12	20.3%
<b>Total</b>	<b>60</b>	<b>100%</b>

Table 4.2.7 above shows that 17 (27.1%) of the teachers had certificates as their highest qualification, 31(52.5%) had Diplomas, while 12 had degrees. The study established that the majority 31(52.5%) of the teacher respondents had Diplomas as their highest professional qualification.

**Table 4.2.8: Teachers' satisfaction with union representation.**

<b>Satisfied</b>	<b>Frequency</b>	<b>Percentage</b>
Yes	4	7%
No	56	93%
<b>Total</b>	<b>60</b>	<b>100 %</b>

Table 4.2.8 above indicates that 4 (7%) of the teachers were satisfied with union representation while 56 (93%) were not satisfied with union representation. Therefore, the study established that the majority 56 (93%) of the teacher respondents were not satisfied with union representation.

**Table 4.2.9: Whether or not Teacher unions carried out any activities at workplaces.**

<b>Are there any activities carried out by teacher unions at your workplace?</b>	<b>Frequency</b>	<b>Percentage</b>
Yes	5	5.2%
No	55	94.8
<b>Total</b>	<b>60</b>	<b>100</b>

Table 4.2.9 above shows that 5 (5.2%) teacher respondents indicated that there were activities carried out by the unions at workplaces, while 55(94.8%) indicated that there were no activities at all. The study revealed that the majority 55(94.8%) of the teachers revealed that there were no activities carried out by unions.

**Table 4.2.10 Teachers' knowledge of booklets that contained Terms and Conditions of Service of the Public Service.**

<b>Do you know the booklets that contain terms and conditions of service?</b>	<b>Frequency</b>	<b>Percentages</b>
Yes	26	44.1%
No	11	18.6%
Not sure	23	37.3%
<b>Total</b>	<b>60</b>	<b>100%</b>

In table 4.2.10 above it shows that 26 (44.1%) of the teacher respondents had knowledge of the booklets that contained the terms and conditions of service, 11 (18.6%) did not know the booklets while 23 (37. %) were not sure as to whether or not they knew them. The study established that the majority 26 (44.1%) of the teacher respondents had knowledge of the booklets.

**Table 4.2.11: Booklets teachers were conversant with.**

<b>Booklet</b>	<b>Frequency</b>	<b>Percentage</b>
Code of Ethics of the Public service	15	25%
Terms & Conditions of Service	11	18.3%
None	34	56.7%
<b>Total</b>	<b>60</b>	<b>100%</b>

Table 4.2.11 above shows that 15 ( 25%) teacher respondents were conversant with only the Code of Ethics of the Public Service, 11 (18.3%) were conversant with only the Terms and Conditions of Service of Public Service workers while 34 (56.7%) were not conversant with any. The study established that the majority 34 (56.7%) of the teacher respondents were not conversant with any booklet at all.



**Table 4.2.12: Whether or not any explaining was given to teachers on the contents of the booklets.**

<b>Received explanation</b>	<b>Frequency</b>	<b>Percentage</b>
Yes	35	62.5
No	25	37.5
<b>Total</b>	<b>60</b>	<b>100</b>

Table 4.2.12 above shows that 35 (62.5%) received some explanation on the contents of the booklets while 25 (37.5%) did not receive any explanation. The study established that the majority 35 (62.5%) of the teacher respondents received explaining on the contents of the booklets.

**Table 4.2.13: Explaining of the contents of the booklets to teachers.**

<b>Who did the explaining</b>	<b>Frequency</b>	<b>Percentage</b>
The Teacher union	10	16.7%
The employer	27	44.4%
Others	23	38.9%
<b>Total</b>	<b>60</b>	<b>100%</b>

Table 4.2.13 above shows that 10 (16.7) of the teachers had explanations given to them by teacher unions, 27 (44.4%) were given explanations by the employer, while 23 (38.9%) were explained to by other agencies. The study established that the employer did more explaining 27 (44.4%) than any other organisation.

**Table 4.2.14 Teacher Union sponsorship for self-upgrade to teachers.**

<b>Ever been sponsored by the union?</b>	<b>Frequency</b>	<b>Percentage</b>
Yes	3	5%
No	57	95%
<b>Total</b>	<b>60</b>	<b>100%</b>

Table 4.2.14 above shows that 3(5%) received sponsorship from the union for training while 57 (95%) did not receive any sponsorship of any kind from the unions. The study indicated that the union sponsored only a few 3 (5%) of the teachers.

#### **4.2.1 Summarised reasons cited by teacher respondents for not belonging to any Teacher Union.**

1. Not satisfied with their services;
2. Not yet captured by any union; and
3. There are no benefits for belonging to a union.

As evidenced above, three reasons were given by teacher respondents as to why they did not belong to any union. Some were not satisfied with the service, others were not yet captured by the payroll system while others did not find any benefits in belonging to a Teacher Union.

#### **4.2.16 Reasons cited by teacher respondents for satisfaction with Union representation.**

Teachers who were satisfied with union representation cited two reasons for union representation satisfaction as indicated in table 4.2.16 above. They thought unions were transparent and helpful.

#### **4.2.17: Justifications given by teachers for dissatisfaction with Union representation.**

The following are the reasons that emerged from teachers' lists as being justifications for dissatisfaction with Union representation:

1. Teacher unions are greedy.
2. Teacher unions serve political interests.
3. Teacher unions serve their own interests.
4. Teacher unions use our money to enrich themselves.
5. Teacher unions do not give teachers' needs the attention they require
6. Teacher unions do not represent adequately

7. Teacher unions side with the administration when a teacher and the management have a dispute.
8. Teacher unions do not motivate members
9. Teacher unions do not consult the general membership.
10. Teacher unions are not transparent.
11. Teacher unions do not sponsor members for further education.
12. Teacher unions are only helpful to relations and friends.
13. Teacher unions are corrupt

Above are the justifications listed by teachers for being dissatisfied with Teacher union representation.

#### **4.2.18 Teachers' expectations of Teacher union representation.**

Listed below are what were grouped thematically according to what teachers expected from Teacher union representation.

Teacher unions should:

1. be more interactive with grassroots;
2. merger so that they can serve the teachers' interests very well;
3. take up responsibility of upgrading teachers professionally and updating them on new skills and information seriously;
4. sponsor teachers for further education;
5. encourage Continuous Professional Development activities;
6. ensure that teachers who acquire higher qualifications, have both their statuses and salaries upgraded immediately after completion of the training;
7. conduct training workshops in schools;
8. orient teachers on changes;
9. update teachers on new circulars, rights and conditions of service;
10. consult the general membership before making major decisions;
11. visit rural schools;
12. attend to teachers needs;

13. hold meetings to listen to teachers' grievances;
14. explain teacher union roles and functions to teachers,
15. explain the contents of the series of Public Service Booklets;
16. look into issues of teachers' health;
17. give loans at affordable rates;
18. have a training policy;
19. serve teachers' interests before their own;
20. be transparent;
21. not be selective;
22. have programmes that will improve the working culture;
23. provide required resources for workers' education;
24. be very active especially at school level;
25. not be influenced by politicians; and
26. not be greedy

#### **4.3 Findings from Head Teacher participants.**

**Table 4. 3. 1: Length of service.**

<b>Years in service</b>	<b>Frequency</b>
1 – 10 years	6
11 -20 years	2
<b>Total</b>	<b>8</b>

Table 4.3.1 above indicates that 6 Head Teachers held the post for 1 -10 years while 2 had served for 11-20 years. The study established that the majority (6) of the Head Teachers held the union position for 1- 10 years.

**Table 4.3.2: Head Teachers' perceptions on whether or not unions were active.**

<b>Are unions active?</b>	<b>Frequency</b>
Yes	1
No	3
Partially	4
<b>Total</b>	<b>8</b>

Table 4.3.2 above shows that 1 Head Teacher felt that Teacher unions were active, 3 felt that they were not active and 4 felt that they were partially active. The study revealed that the majority (4) of the Head Teachers felt that Teacher unions were partially active.

**Table 4.3.3: Head Teachers' satisfaction of Teacher unions' activities in the provision of workers' education.**

<b>Are unions doing enough?</b>	<b>Frequency</b>
Yes	1
No	7
<b>Total</b>	<b>8</b>

Table 4.3.3 above shows that 1 Head Teacher felt that the unions were doing enough in workers education while 7 felt that they were not doing enough. The study established that the majority (7) of the Head Teachers felt that Teacher unions were not doing enough in workers' education.

**Table 4.3.4 Head teachers' perceptions of Teacher unions' performance.**

<b>Are unions performing their duties well?</b>	<b>Frequency</b>
Yes	-
No	8
<b>Total</b>	<b>8</b>

Table, 4.3.4 above shows that no Head Teacher thought unions performed their duties well. 8 out of 8 thought the performance of unions fell below their expectations. The study established that all (8) of the Head Teachers felt that the unions were not performing their duties well.

**Table 4.3.5: Head teachers' responses on whether or not teachers possessed adequate skills.**

<b>Do teachers have adequate skills?</b>	<b>Frequency</b>
Yes	1
No	3
Not sure	4
<b>Total</b>	<b>8</b>

Table 4.3.5 above shows that 1 Head Teacher was of the view that teachers had adequate skills, 3 were of the view that teachers had inadequate skills, while 4 were not sure as to whether or not teachers had adequate skills. The study therefore, established that half (4) of the Head Teacher, respondents were not sure as to whether or not teachers had adequate skills.

**Table 4.3.6: Head Teachers' awareness of the roles Teacher Unions**

<b>Are teachers aware of Teacher Union roles?</b>	<b>Frequency</b>
Yes	3
No	4
Not sure	1
<b>Total</b>	<b>8</b>

Table 4.3.6 above shows that 3 Head Teachers felt that teachers were aware of the roles of teacher unions in workers education, 4 felt teachers were not aware, while 1 was not

sure. The study established that the majority (4) of the Head Teacher respondents felt that teachers were not aware of the roles of unions.

**Table 4.3.7: Head Teachers’ satisfaction of unions’ participation in workers’ education.**

<b>Are unions doing enough?</b>	<b>Frequency</b>
Yes	1
No	7
<b>Total</b>	<b>8</b>

Table 4.3.7 above shows that 1 Head Teacher respondent felt that unions were doing enough while 7 felt that they were not doing enough. The study established that the majority (7) of the Head Teacher respondents felt that unions were not doing enough in workers’ education.

#### **4.3.8: Head Teachers’ perceptions of Teacher unions’ roles.**

Listed below were what Head Teachers perceived as the roles for Teacher unions.

Teacher unions were there to:

1. support retaining;
2. sensitise teachers on unionism;
3. enlighten members on their conditions of service;
4. give members more information about the roles of teacher unions

#### **4.4 Findings from unionists**

**Table 4.4.1 Unions that were represented by the unionists.**

<b>Union</b>	<b>Frequency</b>
ZNUT	14
BETUZ	3
SESTUZ	2
<b>TOTAL</b>	<b>19</b>

Table 4.4.1 above shows that 14 unionists were ZNUT officials, 3 were BETUZ, while 2 were SESTUZ. The study established that the majority (14) of the union respondents were ZNUT officials.

**Table 4.4.2: The level at which the unionists held positions.**

Where position is held	Frequency
School official	15
District official	4
<b>Total</b>	<b>19</b>

Table 4.4.2 shows that 15 unionists held positions at school level while 4 held positions at district level. The study established that the majority (15) of the union respondents, held positions at school level.

**4.4.3: Length of service as unionists.**

Years of holding post	Frequency
1-4 years	14
5 years and above	5
<b>Total</b>	<b>19</b>

Table 4.4.3 shows that 14 union respondents had held their positions for 1-4 years while 5 held their posts for 5 years and above. The study established that the majority (14) of the unionists had held their positions for 1- 4 years.

**4.4.4: Whether or not unionists received induction on unionism.**

Have you been inducted in unionism?	Frequency
Yes	7
No	12
<b>Total</b>	<b>19</b>



Table 4.4.4 shows that 7 union respondents received induction in unionism while 12 did not receive any induction. The study established that the majority (12) of the respondents did not receive any induction at all.

#### **4.4.5: Provision of educational activities by Unionists.**

<b>Do you provide any educational activities?</b>	<b>Frequency</b>
Yes	5
No	14
<b>Total</b>	<b>19</b>

The study in table 4.4.5 above shows that 5 union respondents said that they provided educational activities while 14 said that they did not provide any educational activities. The study established that unions did not provide any educational activities as indicated by the majority (14) of the unionists.

#### **Table 4.4.6: Educational activities carried out by unions.**

<b>Educational activities carried out</b>	<b>Frequency</b>
No activities	19
<b>Total</b>	<b>19</b>

Table 4.4.6 above shows that 19 out of 19 responses revealed that no activities were carried out by unions. The study established that unions did not carry out any educational activities.

**Table 4.4.7: Educational activities carried out by unions on teachers' obligations and rights.**

<b>Do you educate teachers about their obligations and rights?</b>	<b>Frequency</b>
Yes	9
No	10
<b>Total</b>	<b>19</b>

Table 4.4.7 above shows that 10 union respondents said that they educated teachers about their rights while 9 said that they did not. The study established that the majority (10) of the unionists did not educate teachers about their rights.

**Table 4.4.8: Methods unionists used to educate teachers.**

<b>How do you educate teachers?</b>	<b>Frequency</b>
Workshops	3
Meetings	7
None	9
<b>Total</b>	<b>19</b>

Table 4.4.8 shows that 3 unions used workshops to educate teachers, 7 used meetings and 9 did not use any methods to educate teachers. The above translates to the effect that the majority (9) of the unionists, did not use any methods to educate teachers.

**Table 4.4.9: How often unionists educated their teachers.**

<b>How often unions educated the teachers</b>	<b>Frequency</b>
Every term	2
Once a year	1
Not so often	7
Never	9
<b>Total</b>	<b>19</b>

Table 4.4.9 above shows that 2 of the union respondents indicated that they educated teachers every term, 1 of them indicated that they educated them once a year, 7 indicated that not so often, while 9 indicated that they never educated their teachers. The study established that the majority (9) of the union respondents never educated their teachers.

**Table 4.4.10: Union programmes offered to teachers to prepare them cope with the changing society.**

<b>Any programmes</b>	<b>Frequency</b>
Yes	4
No	10
Not sure	5
<b>Total</b>	<b>19</b>

Table 4.4.10 above shows that 4 unionists had programmes to prepare teachers cope with the changing society, 10 said they did not have any, while 5 were not sure. The study established that the majority (10) of Teacher Unions did not have any programmes meant to prepare teachers cope with the changing society.

**Table 4.4.11: Unionists' involvement in training teachers.**

<b>Are you involved in training teachers?</b>	<b>Frequency</b>
Yes	2
No	17
<b>Total</b>	<b>19</b>

Table 4.4.11 above shows 2 of the unionists were involved in training teachers, while 17 of them were not involved in training teachers. The study revealed that the majority (17) of unionists were not involved in training teachers.

#### **4.4.12 : Unionists' roles in workers' education.**

The following emerged as unionists' perception of their roles in workers education:

1. to bridge the gap between teachers and employers;
2. to sponsor some teachers for further education;
3. to impart knowledge to teachers about their rights;
4. to encourage teachers to upgrade themselves professionally;
5. to handle teachers' disputes;
6. to help teachers understand their terms and conditions of service;
7. to encourage members to go on leave;

#### **4.4.13: Challenges faced by unionists in the provision of workers' education.**

The following emerged as challenges that unionists faced in the provision of worker education:

1. lack of educational materials;
2. lack of knowledge and skills to handle union matters;
3. lack of knowledge of what their roles were;
4. lack of time;
5. lack of protection on certain decisions;

6. lack of or inadequate funding;
7. poor information flow from the top; and
8. poor working culture of the teachers.

**4.4.14 : What unionists felt they needed to do in the provision of worker's education.**

Listed below were the responses that emerged as what unions felt they were to do if workers education was to succeed:

1. higher organs should provide Teacher unions at school and district levels with resources;
2. intensify interactions or visitations by officials from the higher offices in schools;
3. set aside money for educational loans;
4. provide sponsorship for professional self upgrade of teachers;
5. cost- share training expenses with teachers;
6. give tangible financial support to teachers in terms of loans and bursaries;
7. orient Head Teachers so that they could be role models;
8. motivate teachers;
9. carry out proper orientations for newly deployed teachers at school level;
10. have budgets for workers education programmes at all levels;
11. all the four Teacher unions should plan together on how they would carry out educational activities in schools;
12. carry out regular educational activities;
13. hold workshops jointly with employers;
14. should develop a training policy which should be availed to all stakeholders;
15. develop programmes that will improve the working culture in schools;
16. planning of training programmes should be inclusive of all levels of membership.

#### **4.5 Summary of chapter 4.**

The chapter presented findings of the study regarding the role of Teacher Unions in workers' education in Kafue District. From the findings, it was noted that 12 (62.5%) of the unionists at school level did not know the role unions were supposed to play in the provision of workers' education. The study further revealed that workers' education programmes could not be fully implemented because the unions who were supposed to be pioneers and providers of the programmes did not have sufficient knowledge and skills to handle it. There are challenges that need to be addressed if workers education is to be well conducted. The next chapter discusses the findings presented in this section.

## **CHAPTER FIVE**

### **DISCUSSIONS OF THE FINDINGS**

#### **5.1 Introduction**

The chapter discusses the findings of the role of Teacher unions in workers' education in Kafue District. The following were the objectives of the study:

- a) to establish the role Teacher Unions play in educating teachers on their conditions of service;
- b) to determine the involvement of Teacher Unions in programmes meant for professional upgrade of teachers;
- c) to ascertain the educational activities offered to teachers on coping mechanisms; and
- d) to establish the involvement of Teacher unions in updating teachers on changes and innovations in the education system

Teacher Unions have a role to ensure that the education teachers receive is meaningful and continuous. They need to empower teachers so that they continue to sharpen their skills, increase their knowledge and have a 'voice'. However, the study revealed that Unions in Kafue District were not performing to the expectation. This was because the Teacher unions at district and school levels had limited knowledge of their roles and were inadequately, or not funded at all for workers' education programmes. The study also revealed that unionists did not receive any induction when they starting their union duties, they were doing job on training, a situation that could yield un favourable results as there is no sensitization of what is expected of them on the job, everything is on trial and error basis.

#### **5.2 The Role of Teacher Unions in educating teachers on their Conditions of Service.**

##### **5.2.1 Union membership.**

The major objective of the study was to establish the role Teacher Unions play in educating workers about their conditions of service. In Zambia, there are four unions

representing teachers. These are the Zambia National Union of Teachers (ZNUT), Basic Education Teachers' Union of Zambia (BETUZ), Secondary School Teachers Union of Zambia (SESTUZ) and Professional Teachers union of Zambia (PROTUZ).

The study revealed that the majority of the teachers belonged to unions and that the majority 33 (55%) of them belonged to ZNUT. This confirms the assertion that ZNUT, among all the Teacher unions in Zambia, has the widest coverage and the largest membership, a situation that could be associated with it being the oldest union, as stated by Malungo (2008:1). It may however, be argued that the high representation could be a result of ZNUT having its presence in both secondary and primary schools while BETUZ and SESTUZ, are only present in primary and secondary schools respectively. The study further revealed that the majority of the union officials were ZNUT officials. This is in resonance with the general membership of teachers that is also higher than that of all the other unions.

At the time of data collection, PROTUZ was in its infancy. To note that it already had 6 (10%) while both BETUZ and SESTUZ which were much older had 9 (15%) members each, could be a sign of dissatisfaction in the existing unions. Teachers could have defected to the new Union, probably with the view that, it would bring in hope for the hopeless.

### **5.2.2. Reasons for teachers not belonging to any union**

The study revealed that some teachers did not belong to any union for three reasons. The first was that they were not satisfied with the services that the unions were providing. The second reason was that they were still new in the teaching profession and the payroll system was yet to capture them. The third and final reason was that they did not perceive any benefits for belonging to a union. Such a scenario could have come about because of the Teacher Unions not performing their roles properly. The findings clearly indicate that teachers were not satisfied with the roles and functions of the Teacher unions to such an extent that some of them felt that there was no need of belonging to any one of them.

If unions had workers' education programmes for newly deployed teachers, the study would not have found out that any union did not yet capture some of the teachers. This is



because at the time of deployment, unionists should have been there with programmes aimed at empowering teachers with unionism and at that point, teachers would have seen the need of belonging to a union. For those who stated that they did not perceive any benefits of belonging to a union, it could have been because the presence of unions was not felt at all.

#### **5.2.4 Reasons for satisfaction of union representation**

The few teacher respondents who indicated satisfaction for belonging to unions gave two reasons for their satisfaction. One was that unions were transparent and the other was that they were very helpful to members. The teachers who were satisfied could be the few who received help from unions for upgrading themselves professionally. Teachers need to see benefits in wherever they place their investment. They also want to be aware of all the happenings. This is good for unions because it translates into positive impact on representation.

#### **5.2.5. Justifications for dissatisfaction with union representation.**

The study indicated that the reasons for dissatisfaction of how teacher unions represented members outweighed those for satisfaction. The following were presented as some of the reasons for dissatisfaction. Teachers felt that Teacher Unions ; were greedy; served political interests served their own interests; used the money collected from members to enrich themselves; did not give teachers' needs the attention they required; did not represent adequately; sided with the administrators in times of dispute; did not motivate teachers, did not consult the general membership, were not transparent; did not sponsor members for further education; were only helpful to relations and friends and that unions were corrupt.

The picture presented above is not very good for unions because it could lead to diminishing membership. It indicates lack of trust and suspicion. Although teacher unions have a positive impact on wage negotiations, they have not really been involved in workers education and training activities. This could have a negative impact on participation in education and training.

#### **5.2.6. Knowledge of books that contain their Terms and Conditions of Service**

According to Kakkar (1973), workers' education is an attempt on the side of organized labour to educate its members under the education system in which the workers prescribe the course of instruction, select teachers and furnish the finances. Morgan (1989) contends that workers' education is an educational programme that is practical and concerned with the daily needs of the workers at work and outside their workplace. Workers' education avails workers with the training they need to perform an effective role in the economic and social life of their societies.

The study found out that 44.1% of the teacher participants had knowledge of the booklets that contained Terms and Conditions of service, 18.6% had no knowledge of the booklets while 37% were not sure. The facts that 18.6% and 23% (55.9%) had no knowledge and were not sure as to whether or not they knew the booklets, respectively could be an indication that the Teacher Unions were not equipping teachers with knowledge of books that guided them to know their conditions of service. It is important that teachers become familiar with the conditions of service in order to strengthen themselves as professionals. The knowledge can also boost the morale and commitment of teachers. This is in tandem with Ministry of Education (1996:115) which states that, '*Terms and conditions of service crucially affect the morale and commitment of teachers.*'

#### **5.2.7. Familiar Conditions of Service Booklets.**

According to Cabinet Office (2003: i), the initial four booklets were produced and issued in 2003 to provide an essential framework for the day-to-day operations. These were Terms and Conditions of Service for Public service, together with Service Commission Regulations, Service Commission Policies and Procedures for Employment in the Public Service, Disciplinary Code and Procedures for Handling Offences in the Public Service. Any other administrative Circulars and Instructions issued from time to time by Cabinet Office and the office of the Permanent Secretary were to support the above-mentioned booklets. The fifth booklet is the Code of Ethics for the Public Service, issued in 2007 by Cabinet Office. This was an addition to the existing documents.

These booklets, that are cabinet office booklets cover the following: how to get employed and promoted in the teaching service; information about confirmation of appointment; types of leave and how to get it; teacher discipline; annual appraisals and how they work and retirement.

Sadly, the study revealed that out of the five booklets that provided an essential framework for the day-to-day operations of the Public Service; to which teachers belonged, only two were popular among the respondents.

According to the responses, 15 (25%) of the teachers were conversant with the Code of Ethics, 11(18.3%) with Terms and Conditions of Service while 34(56.7) were not conversant with any.

These two books could have been popular probably for two reasons. The district officials used the Terms and Conditions of Service booklets to orient new teachers while the Code of Ethics for Public service was distributed to every teacher when it was first published in 2007. Knowing one's rights, is in tandem with what ILO (1995:76) advocates, '...education confers awareness of rights, helps people to understand how they can assert and defend their rights, and offers significant chances of improving economic status. Trade unions must seek access to these benefits for their members.'

The above revelation is worrying because out of the five essential booklets that guide the day-to-day operations of workers, only two were familiar to respondents. Yet a breach of, say, the code may lead to application of the already existing disciplinary provisions in the four booklets earlier issued, unfortunately of which teachers were not conversant with.

All the above mentioned booklets were issued in the determination of the Government to improve the management of the Public Service and to provide a conducive environment for an efficient and effective Public service delivery system. It was also hoped that the documents would enable Public Service employees carry out their duties expeditiously, in order to provide quality service delivery to the people of Zambia (Cabinet Office:2003:i).

If teachers do not have any or adequate knowledge of the contents of the booklets, their capacity to carry out the duties will be adversely affected. For the majority (34=56.7%) of

the teachers not to be familiar with the booklets, translates in them not knowing their rights and obligations. It also means that teachers may not be sure of ethics that they need to uphold. According to Cabinet Office (2007:3), the purpose of the Code was to

*create a public service that has enduring core values; provide guidance on standards of behaviour required of public service employees; and form basis for the development of Codes that may be required for specific departments or institutions in the public service to suit particular operational requirements and circumstances.*

Lack of knowledge of the code, may lead to teachers not being efficient and effective. The lack of education on Terms and Conditions of service may lead to infringement of teachers' rights. It is, therefore, imperative that all unions ensure that all Public Service employees familiarize themselves with the provisions of the booklets that outline ethics rights and obligations.

#### **5.2.8. Teacher Education on Contents of the Conditions of Service Booklets.**

The study showed that teachers were given some explanation of the contents of the booklets they were familiar with. The findings further showed that, the majority 62.5% of the teacher respondents had contents explained to them while 37.5% did not receive any explanation on the contents of the booklets. The revelations further indicated that the other three booklets were not well known. The booklets attend to different but equally important issues. Therefore, lack of knowledge in any one of them translates into lack of knowledge in the information covered by that book.

#### **5.2.9. Providers of education on conditions of service.**

The teacher respondents were further asked to indicate who did the explaining of the contents of the booklets to them. The study revealed that 16.5% of the teachers had explanations given to them by Teacher Unions, 44.4% by the employer and 38.9% by others.

In as much as the employer has the mandate to educate its workforce, the union also has a role to play. This is in line with the International Trade Union Confederation (ITUC) (1988:17) which maintains that, *'it is the responsibility of governments to guarantee the*

*right to education and making lifelong education a reality for all.*’ It feels that this is the key to participation in the knowledgeable society. It also proclaims that trade union education is a vital instrument for building the capacity of trade unions and that of their members to enable them improve and strengthen their organizations and to play a constructive, purposeful and creative role in their workplaces and societies.

However, the revelations of the study are worrying, as they indicate that Teacher unions were doing very little in the provision of education on conditions of service. Bratton, Helms, Pych and Sawchuk (2003) argue that, the learning that goes on in the workplace should be understood from at least two different perspectives, that of management and owners on one hand and that of work and their organizations on the other. In fact, to them, workplace learning represents a contested terrain of social, political and economic struggle. The purpose of trade unions is to represent the interests and worldview of the diversity of workers and its goals in terms of workplace learning can be seen as well as in opposition to those of management. Unions play an important role in shaping the everyday experiences of workers within the labour process, through specific information and action campaigns.

When unions neglect or leave the education on Terms and Conditions of service to the employer, workers may not receive the required education because the employer might want to employ the divide and rule strategy. Employers tend to be selective with content when educating the teachers. The employers may choose to withhold any information that can advantage the teachers but disadvantage the employer and only provide that will advantage them.

For example, ZNUT (2012:4) tells a sad tale of a retired teacher. The teacher retired in 2004 as a Head Teacher at a Basic School in Petauke District. Despite notifying the Ministry of Education then, and the Teaching Service of his impending retirement when it was due, the payroll system still maintained him until 2006. The employer did not re-engage him on contract but continued paying him a salary. Little did he know that by not having a contract but drawing a salary, would affect his pension. The other unfortunate thing he did not do, was not to ensure that he received an appointment letter as a Head Teacher from the Teaching Service Commission during his working life. This made him

continue getting a lower salary and consequently a lower retirement package than the other Head Teachers heading the same grade of schools, and retired at the same time as he did.

The teacher mentioned above was not a mere teacher but a Head Teacher. If he was that ignorant of the Terms and Conditions of service, what more with the teachers he was managing and leading. Head Teachers also need to be educated more so, that they become Head Teachers without first undergoing training. Therefore, Teacher Unions should take an active role in educating teachers on terms and conditions.

#### **5.2.10. Perceptions of Head Teachers regarding the roles of Union Officials.**

The following are what were perceived by Head teachers as roles of the unions in workers' education. They said unions were supposed to support retraining; sensitise teachers on unionism; enlighten members on conditions of service and to give members more information on roles of unions.

The study further revealed the following as the perceived roles of the unionists: to bridge the gap between the teachers and the employer; to sponsor some teachers for further education; to impart knowledge to teachers about their rights; to encourage teachers upgrade themselves professionally ; to handle disputes that concern teachers; to help teachers understand their conditions of service; and to encourage teacher members to go on leave.

### **5.3. Teacher unions' involvement in teachers' professional upgrade programmes.**

#### **5.3.1 Professional upgrade of Teachers.**

The study showed that 75% of the teachers had upgraded themselves professionally while 25% never upgraded themselves at all. This is a very encouraging situation because the majority of the teachers had upgraded themselves professionally as the pace of technological change, which many working people have been exposed to, has been accelerating rapidly.

ILO (2007:3) stresses that, a result of this change has been a greater emphasis on continuing education throughout a workers' life. Despite the extended duration of primary , secondary and tertiary education, the knowledge and skills acquired at these levels are not sufficient for a career spanning three or four decades. In many countries, it is no longer possible to train a worker in a single technology at the start of his/her working life and to expect technology to remain substantially unchanged for years.

The Ministry of Education (1996: 108) acknowledges the inadequacy of the first training one receives when it says that, '*...the initial preparation, provided in training colleges and the universities, does no more than lay the foundation for a lifetime of teaching.*' There is need for regular ongoing professional development in a process that is never complete. This is because a teachers' professional life revolves around two areas of never ending growth and progression: knowledge, which is always increasing and changing; and children, each one unique and developing within the fabric of a changing social environment. Initial teacher education is little more than the start. There must be provision for the ongoing development of each member of the teaching profession.

Leach (1996) as quoted in ILO (1995: 17) also points out that Professional development in education is a career-long process. It is not a single event, or a course of study. Though both may form a part of the overall process, rather, it is a continuum, a complex, often uncertain but potentially creative journey from the earliest stages of initial teacher education, through to the latest stages of being an educational professional. For if, professional development is about real change, it can only realistically take place over time and in the context of continuity of personal goals and aspirations as well as institutional purposes. It will, usually, include periods of supported training, study or research.

Skelton, Reeves and Playfoot (1994: 84-86) point out that

*'ultimately, change is only achieved fully when individuals have changed their perceptions and values and it is important to be realistic about the amount of time it takes. Change affects the individuals concerned. It requires everyone to adapt from comfortable ways of behaving to at least temporarily uncomfortable ways.'*

For real professional growth, however, there must be a direct relationship between such education and practice itself. Professional development is also essentially a social as well as a personal practice. It should be realized that teachers go through a process where their 'development' is discussed in terms of pay, conditions and their possible future employment.

There is great need for training and professional development in the education system if competencies have to be sharpened. This is in line with the position of the Ministry of Education as outlined in its National Policy on Education (Educating Our Future), which emphasises the fact that training and professional development underpin what a teacher can accomplish in a school. The essential competencies required in every teacher are mastery of the material that is to be taught, and skills in communicating to pupils (Ministry of Education of 1996: 108).

These deceptively simple formulations cover a great array of knowledge, understanding and skills that must become integral to every teacher. For example, the preparation of a medical doctor to be able to diagnose a patient's problem and then treat it successfully takes many long years of arduous preparation and training. Likewise, the preparation of teachers in understanding their field and how to teach requires lengthy and careful attention.

### **5.3.2. Sponsorship for Professional Upgrade.**

Teachers may have the desire to upgrade themselves professionally. However, financial resources may be a limiting factor. The study revealed that only 5% received sponsorship from the union for further training while 95% did not receive sponsorship of any kind from the unions. The study indicated that only a few (5%) of the teachers were sponsored by the unions. The figure is insignificant. The union was not taking a leading role in the upgrading of teachers. The increasing pace of technological evolution in the education system, like any other occupation, imposes the need for training as a continuous activity. The understanding and efficient application of new innovations in the education system depends on the availability of regular refresher courses and training in new techniques for people whose initial educational level was relatively high. Usually older workers are at



risk. They therefore, need to develop counseling and retraining services tailored to their needs.

If staff development is to be part of a school development or a contributor to it, then the targets set for individual members of staff also need to be achievable within the context of their own personalities, abilities and other demands upon them. Only then can staff development have a chance of being effective.

### **5.3.3 Sponsorship for Professional Upgrade**

The study revealed that 82.4% teachers sponsored themselves for Professional upgrade, the unions sponsored 5.9% while 2% were sponsored by the government. The picture above is not pleasant. This is because the two important parties in the teachers' working life did not seem to take an active role in the Professional upgrade of the teachers. This does not give them a firm grip on the workforce. It could bring about brain drain in the education system. The Ministry of Education can become a training ground for other organizations without benefiting from the teachers who upgrade themselves. Teachers were not following a career path as they were using their own resources to upgrade themselves. A situation that has brought a lot of misery to teachers. This is because they pursue courses that may not be needed by the employer. They end up getting frustrated because the system may not recognize the qualifications they acquire. For example, the Ministry of Education currently is not recognizing degrees for teachers who have done Adult Education on the premise that they have no teaching subject. Such a situation would have been avoided if workers' education programmes were active.

### **5.3.4 Teachers' qualifications.**

The lowest professional qualification in teaching is a certificate while the highest is a degree. The study revealed that 27.1% of the teachers had certificates as their highest qualifications, 20.3% of them had degrees while 52.5% had Diplomas. This indicates that the professional upgrade was largely from certificate to Diploma level, probably because the tuition fees were affordable. It is sad that even when the colleges were no longer offering certificate courses, little was being done to upgrade those who still held certificates to either diploma or degree level. This is in line with the observation made by

The Director General of the ILO to a conference in 1979, pointed out that although there has been a tremendous growth in higher education since the 1960s, the average educational requirements of work do not seem to have risen at the same rate as average educational attainments.

### **5.3.5 Induction received by union officials.**

Union staff members are often expected to learn on the job. The result is that most of the members were inadequately trained in the basic functional aspects of the union and unable to respond to new challenges posed by phenomena such as globalization. Staff members needed not only initial training but also lifelong education as well.

The study revealed that the majority (12 out of 19) of the unionists did not receive any induction before taking offices. This translates into job on training. One of the problems with on- the job - training is that along with the good, a number of bad things on the job may be learnt. Take an example of a new union official mentored by another official who has undesirable methods of leading or is ignorant about the roles of the union. The leadership style will definitely be undesirable. This would definitely affect the union operations. However, job- on- training can equally be good if the mentor has good practices.

Training is the best way forward. This should be both before and after undertaking the job. According to Graham (1988:182)

*‘training has the important dual function of utilization and motivation. By improving employees’ ability to perform the tasks required by the company, training allows better use to be made of human resource by giving employees a feeling of mastery over their work.’*

## **5.4. Educational activities on coping mechanisms.**

### **5.4.1 Teacher union activities carried out at workplaces.**

The study revealed that 5 out of 19 union respondents indicated that they provided educational activities while 14 out of 19 accepted that they never provided any activities. This is at variance with the responses they gave when they were asked what educational activities they provided. The responses of the unionists indicated that they did not offer

any. This simply confirms that unions did not offer any educational activities. This is not in line with what the International Confederation of Free Trade Unions (ICFTU) (1988) which advocates for a well-trained, informed and active membership combined with a skilled resourceful, responsive and democratically supported leadership. This is the best means by which to ensure the growth and effectiveness of trade unions' preparedness to meet the challenges of the future. Trade union education must increasingly address emerging complex issues, such as the growth of new technologies, new patterns of work and occupational health and safety concerns.

#### **5.4.2. Educational activities carried out.**

The study revealed that all 19 unionists agreed that they never provided any activities on coping mechanisms. They were in agreement with the teacher participants 55 (94.8%) who also said there were no union activities that were offered at the workplace. This is a worrying situation because there is need to teachers help adapt to the dynamic society that has brought about many changes. These may be in health, economic or social circles. The impact of these changes is significant. They are changes in the culture of work. The failure to appreciate this major factor could be a major factor in labour unrest. If workers are not adequately retrained to meet changes, both productivity and job security are at risk. If they cannot adjust to new values or concepts of work, distress and unrest also result.

### **5.5 Teacher unions' involvement in updating teachers regarding changes and Innovations in the Education system.**

#### **5.5.1 Programmes for Teachers to cope with the changing society.**

The study revealed that majority 10 out of the 19 unionists did not offer any programmes meant to prepare teachers cope with the changing society and yet, ILO (1994:84) stresses that 'for Teachers' Unions, a special priority should be to improve teaching approaches through in-service programmes....'

### **5.5.2 Educational activities carried out by unions**

According to the revelations of the study, all the 19 unionists said that they did not carry out any educational activities for their members. The study also revealed that one out of nine Head Teachers felt that teachers had adequate skills, while three felt teachers had inadequate skills, and four of them were not sure as to whether or not teachers had adequate skills. The findings indicated that unions did not provide any educational activities and yet teachers needed more skills to perform their jobs well. As indicated earlier on in the study, there is no one who can ever receive adequate skills to last a lifetime. It is sad that unions did not provide activities when teachers needed to have adequate skills.

## **5.6. Challenges faced by unionists in the provision of workers' education**

The study revealed some challenges that unions faced in the provision of workers' education. These are discussed under the following sub themes;

### **5.6.1. Lack of resources.**

The unions cited lack of resources as one of the challenges they faced in the provision of workers' education. The resources lacked included educational materials, time and money. This could be one of the major reasons why Unions were not carrying out workers' education Programmes. Resources are fundamental in carrying out activities.

### **5.6.2. Lack of skills and knowledge.**

Lack of knowledge and skills was another theme that were cited. The lack of knowledge and skills were cited in handling union matters and knowledge on their roles. Poor information flow was also from the top organs is another challenge that was cited. When information flow is poor, it translates into lack of adequate knowledge and culminates into ignorance.

### **5.6.3. Other challenges**

The other challenges that the unions faced as revealed by the study were that unionists did not feel secure enough to execute their duties. This could be associated with them not knowing their rights, functions and roles.

## **5.7 Teachers' expectations.**

The findings of the expectations from teachers will be discussed under the following subthemes; provision of workers' education, interaction with teachers, conduct of union officials, social and economic factors.

### **5.7.1. Education.**

The study revealed that teachers expected unions to take up the responsibility of upgrading them professionally and updating them on new skills and information. Sponsorship for further education was another factor that teachers expected. Continuous Professional Development was another expectation from the teachers. Updates and orientations on changes were another thing that unions expected from unions. This included updates on new circulars, rights and conditions of service. This is in tandem with ILO (1994: 83) which states that

*'education for the general membership must include sensitization...it should also include opportunities for training. It is important that trade union members be given the opportunity to become familiar in detail with the structure and operation of their own union. The purpose is to become aware with ones organisation.'*

### **5.7.2. Interactions with Teachers**

Teachers expected unions to interact more with the grassroots, conduct workshops, hold meetings in schools. They felt that consultations with general membership before making any major decisions was very necessary. Members need to feel appreciated and should be involved in staff development plans. This is because it rests on personal development.

This is in line with Nias quoted in Skelton, Reeves and Playfoot (1994: 87) who suggested that,

*...teacher development rests on personal development that the management of change in schools can precede no faster than the individual's sense of personal identity allows. This simply means that development is not something that can be done to people. It is something that people do to themselves. This explains why the 'send her on a course' method of development is such a hit- and-miss affair.*

### **5.7.3. Conduct of union officials**

The findings indicate that teachers expected unionists not to be corrupt, easily influenced by politicians and greed. They expected them to be transparent and serve members' interests. Every member is entitled to equal and fair treatment.

### **5.7.4. Social and economic factors**

Teachers expected unions to attend to their social and economic needs by attending to health issues and by helping them access affordable loans.

### **5.7.5. Head Teachers' Expectations.**

The study revealed that Head Teachers expected Teacher unions to support retraining, sensitise teachers on unionism, enlighten members on conditions of service, and give members more information about their functions and roles.

## **5.8 Summary of Chapter 5.**

This chapter discussed the findings that emerged from the study that was conducted in Kafue on the role of Teacher Unions in the provision of workers' education.

The findings of the study revealed that the Teacher Unions had very little impact in the provision of workers' education. The unions did not know the role they needed to play in workers' education. Furthermore, all the three categories of respondents, pointed out that

there were no educational activities carried out by the unions and that unions needed to be more proactive in the provision of workers' education.

The findings revealed that Teacher unions were barely involved in programmes meant for the professional upgrade of teachers. The majority of the teachers that upgraded themselves professionally used their own resources to do so and had their own motives for pursuing higher qualifications.

The study also revealed that Teacher Unions were not consistent in updating teachers on changes and innovations in the education system. The next chapter presents the conclusions and recommendations of the study.

## **CHAPTER 6**

### **CONCLUSION AND RECOMMENDATIONS**

#### **6.1 Introduction**

This chapter presents the conclusion and recommendations of the study based on the findings and discussions on the role of Teacher Unions in the provision of workers' education in Kafue district.

#### **6.2 Conclusion**

The responsibility of trade unions has always been, and must always be, to defend the rights and interests of workers. They should judge whether public educational provisions in existence or proposed meet acceptable criteria of social justice and whether they provide real and practical possibilities of access by workers to education. Defending workers' interest must be translated into programmes of positive goals. If the education offered to workers is to greatly improve the economic status of the individual workers, it should be appropriate and accessible (ILO 1995: 75-76).

One of the objectives of the study was to find out the role Teacher Unions played in educating workers on their conditions of service. The study revealed that Teacher unions were not carrying out their role in the provision of workers' education adequately. The general picture from the study revealed that the majority of the teachers were not conversant with the booklets that contained terms and conditions of service for Public service workers. Out of the five booklets that contained the conditions of service, only two were familiar to teachers. There was a lot of dissatisfaction among the members on the role of Teachers' Unions played in workers education. Even the unions themselves did not know their role in the provision of workers' education.



The second objective aimed at finding out the involvement of Teachers' unions in programme for professional upgrade. The study revealed that the involvement of the unions was inadequate. The majority of the teachers upgraded themselves professionally. Teacher unions were not taking a leading role in pioneering the professional upgrade for teachers. According to the revelations of the study, other organizations were more involved in sponsoring teachers for professional upgrade than the Teacher Unions.

The third objective was to find out the educational activities offered on coping mechanisms. The study revealed that the Teacher Unions were not offering any educational activities that would help teachers cope with the social- economic changes.

The fourth and last objective aimed at finding out the Teachers' unions' involvement in updating teachers on changes and innovations in teaching. The study revealed that the involvement was not sufficient.

### **6.3 Recommendations**

In view of the findings of the study, the following recommendations were made:

- i. Teacher Unions should play an active role in educating teachers about their rights and conditions of service. The United Nations International Covenant on Economic, Social and Cultural Rights, Article 13, 2(a)-(c) as quoted in ILO (1995:19) recognized the right to education. It also states that 'education shall be directed to the full development of the human personality and the sense of its dignity, and shall strengthen the respect for human rights and fundamental freedoms.' Teacher unions should give directions to lower union structures on how workers' education should be carried out. They should therefore, provide guidelines and allocate a certain percentage in their budget towards workers' education.
- ii. Teacher unions should get more involved in teachers' professional self upgrade. They should help teachers access sponsorship for their further education. They should also be transparent in the way they sponsor teachers. Every teacher should have equal right to accessing the funds.

- iii. The world is changing rapidly in many ways. Teachers, like other workers, are affected either positively or negatively by the changes. Teacher unions should help teachers cope with these changes by having programmes that can help them acclimatize. One of the issues that Teacher unions should take seriously is workers' education in financial issues. This is because teachers are getting loans which most of them have abused.
- iv. Teacher Unions must always update teachers on changes and innovations that may be issued.

#### **6.4 Suggestions for further research.**

- 6.4.1 The present study recommends that in future, a study should be carried out to determine factors leading to poor provision of workers' education.

#### **6.5 Summary of Chapter 6**

The chapter presented the conclusion and recommendations of the study regarding the role of workers' education in Kafue District. The study revealed that Teacher Unions were not executing their roles to the expectations of teachers. The study recommends that Teacher unions should play an active role in the provision of workers' education, get more involved in teachers' professional self upgrade, provide programmes which can help teachers cope with the ever changing world and they should always endeavour to update teachers on changes and innovations in the education system.

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**APPENDIX A**  
**THE UNIVERSITY OF ZAMBIA**  
**SCHOOL OF EDUCATION**  
**DEPARTMENT OF ADULT EDUCATION AND EXTENSION STUDIES**  
**QUESTIONNAIRE FOR STUDENTS AND LECTURERS AT THE UNIVERSITY OF**  
**ZAMBIA**

**INTRODUCTION TO RESPONDENTS**

Dear Respondent,

My name is Maureen Shipota. I am a student of the University of Zambia pursuing a Masters of Education in Adult Education. I'm required to carry out a study on the role Teacher Unions play in Workers' Education in Lusaka Province. You have therefore, been randomly picked as one of the participants in this study.

I am humbly requesting for your openness, co-operation and of course, your positive contribution towards this study in order for the truth to come out on the issue under study. I want to assure you that the information being gathered is solely for academic purposes and will be treated with the confidentiality it deserves.

Thanking you in anticipation.

## APPENDIX B

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### QUESTIONNAIRE FOR TEACHERS

1. Do not write your name on the questionnaire.

2. Tick or write your response in the spaces provided.

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#### PART ONE

1. What is your gender?

i. Male [    ]

ii. Female [    ]

2. How long have you served in the teaching profession.

i. 1 -10 years [    ]

ii. 11 -20 years [    ]

iii. 20 -30 years [    ]

iv. Over 30 years

3. Do you belong to any Teacher Union?

a) i Yes [    ]

ii. No [    ]

b) If yes in a) above which union do you belong to?

i. BETUZ

ii) SESTUZ

iii) ZNUT

c) If, **NO** in (a) above, why don't you belong to any union?

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4. a) Have you ever upgraded your education?

Yes [    ]

No [    ]

5. Who sponsored you?

a. self [    ]

b. union [    ]

c. employer d. other [    ]

6. What is your highest qualification?

i. Certificate [    ]

ii. Diploma

iii. Bachelors degree [    ]

iv Masters degree

## **PART TWO**

1 a) Are you satisfied with the way your union represents you?

i. Yes [    ]

ii. No [    ]

b) Give a brief explanation for whatever answer you have given above.

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2. a) Does your union carry out any educational activities to teachers in your school?

i. Yes [    ]

ii. No [    ]

b) If your answer was yes in (a) above list the educational activities.

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3. (a) Do you know the books that contain the rights and conditions of service for teachers?

i. Yes [    ]

ii. No [    ]

iii. Not sure [    ]

b) If your answer in (a) above was yes, list them.



5.a) Are you satisfied with your union's representation?

i. Yes [    ]

No [    ]

b) Explain.-----

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6. In your own opinion, what do you think the Teacher unions should do for the teachers to promote continuous professional development?

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I really thank you for dedicating your valuable time to answering this questionnaire.

GOD BLESS YOU.

Maureen Shipota Mulendema      0977 755853 or 0966 755853 or 0955 755853

Below is my address :

Maureen Shipota Mulendema ( Mrs)

Shikoswe Primary School

P.O. Box 360296

KAFUE

## APPENDIX C

### QUESTIONNAIRE FOR UNIONISTS

Dear Respondent,

I am a student of the University of Zambia pursuing a Masters of Education in Adult Education. I'm required to carry out a study on the role Teacher Unions play in Workers' Education in Lusaka Province. You have therefore, been randomly picked as one of the participants in this study.

I am humbly requesting for your openness, co-operation and of course, your positive contribution towards this study in order for the truth to come out on the issue under study. I want to assure you that the information gathered is solely for academic purposes and will be treated with the confidentiality it deserves.

Thanking you in anticipation.

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**1. Do not write your name on the questionnaire.**

**2. Tick or write your response in the spaces provided.**

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1. Which union do you represent?

ZNUT [    ]            BETUZ [    ]            SESTUZ [    ]

2. What position do you hold?

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3. For how long have you held this post?

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4. Have you ever received any induction or training on the functions of your office

Yes [    ]                      No [    ]

5. a. Do you provide educational activities to teachers?

Yes [    ]                      No [    ]    Sometimes [    ]

b. if the answer above is yes give details on the educational activities that you provide.

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6. a) Do you educate teachers on their rights?

Yes [     ]                      No [     ]

b) If your answer in a) above is yes, what documents do you use?

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c) How do you educate the teachers?

Workshops [     ] seminars [     ] meetings [     ]

d. How often do you sensitize the teachers?

Every term [     ] once a year [     ] Not so often [     ]

7. a) Are there any programmes that your union has set to prepare workers face problems in the social and economic settings?

Yes [     ]    No [     ]    Not sure [     ]

b) If yes, in a) above list them.

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8. What do you think is the role of Teacher unions in workers' education?

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9. a) Are you involved in the training of teachers

Yes [     ]                      No [     ]

b) If the answer above is yes, what training is available for your teachers?

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c) Who is eligible for the training?

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10. In your own words give a brief description of what role the your teacher union is playing in workers' education

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11. What challenges do you face in the provision of workers education?

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12. In your own opinion what do you think should be done to improve workers' education?

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**Thank you for your time GOD BLESS YOU.**

M.S.Mulendema 0977/0966/0955 - 755853



M.S.Mulendema      0977 755853 or 0966755853 or 0955 755853

My address is given below:

Maureen Shipota Mulendema ( Mrs)

Shikoswe Primary School

P,O. Box 360286

KAFUE

## APPENDIX D

### QUESTIONNAIRE FOR HEADTEACHERS

1. How long have you been in this school?  
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  2. Are unions in your school active?  
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  3. What activities do they carry out?  
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  4. Do you think the unions are doing enough in workers' education?  
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  5. What problems do you face with teachers?  
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  6. Do you think unions are executing their duties very well?  
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  7. In your school do you think teachers have adequate skills and knowledge to carry out their work?  
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  8. If not what do you think should be done to equip the workers with the skills and knowledge.  
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  9. What is the relationship between your office and the unions?  
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  10. Are teachers in your school aware of the roles of the unions?
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11. What role do you think the unions should play in workers education?

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M.S.Mulendema      0977 755853 or 0966755853 or 0955 755853

My address is given below:

Maureen Shipota Mulendema ( Mrs)

Shikoswe Primary School

P,O. Box 360286

KAFUE

**APPENDIX E****BUDGET**

DESCRIPTION	QUANTITY	NO OF DAYS	UNIT RATE (K)	AMOUNT (K)
<b>Professional allowance</b>				
Consultant fee	1	3	50	50
<b>Subtotal</b>				<b>150</b>
<b>Stationary</b>				
Writing pads	3		10	30
Pens	2 boxes		25	50
Reams of paper	2		30	60
<b>Subtotal</b>				<b>140</b>
<b>Transport ( petrol)</b>	100 L		10	1000
<b>Subtotal</b>				<b>1000</b>
<b>Secretarial services</b>				
Typing				
Toner (Printing)			450	450
<b>Subtotal</b>				<b>450</b>
<b>Lodging</b>				
Lunch	10	10	50	500
<b>Subtotal</b>				<b>500</b>
<b>Contingency 10%</b>				<b>224</b>
<b>Grand total</b>				<b>2,464</b>

## APPENDIX F

### TIME LINE/ SCHEME OF ACTIVITIES

ACTIVITIES	FEB	MARCH	APRIL	MAY	JUNE	JULY	AUG	SEPT
Research topic approval by the supervisor								
Draft Research submission to the supervisor								
Proposal approved by the supervisor								
Proposal submission to the supervisor								
Collection of data and interpretation								
Report writing								
Report submission								