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**ISSUES IN THE PLANNING AND UTILIZATION OF HUMAN
RESOURCES IN HIGH SCHOOLS IN THE RUSTENBURG
DISTRICT OF THE NORTH WEST PROVINCE.**

BY

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**A MINI DISSERTATION SUBMITTED IN PARTIAL
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WEST.**

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PIT

DECLARATION

I, Mokgesi Johannes Pitse declare that the dissertation for the degree of Masters in education at the University of the North West hereby submitted, has not previously been submitted by me for a degree at this or any other university, that it is my own work in design and execution and all materials contained herein has been duly acknowledged.



M. J. Pitse

DEDICATION

This work is dedicated to my late father, Reuben and my mother, Mmammutla. It is further dedicated to my six brothers & sisters, Sporty, Dawn, Saedi, Kgomotso, Johanna and Molefe.

A special word of dedication goes to my four children, Ntumo, Saedi, Boipelo and Kagiso (Reuben).

This work is finally and most especially dedicated to my wife Mmapula.

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ABSTRACT

ISSUES IN THE PLANNING AND UTILIZATION OF HUMAN RESOURCES IN HIGH SCHOOLS IN THE RUSTENBURG DISTRICT OF THE NORTH WEST PROVINCE.

The purpose of this study was to determine the nature and scope of planning and utilization of human resource; to determine from literature strategies and models in planning and utilization of human resources; and finally to determine empirically, challenges and issues facing managers, planners and teachers in the planning and utilization of human resources.

In this study , the self-administered questionnaire method was used to gather data. A 23 item questionnaire was developed to determine the perceptions of respondents regarding issues in the planning and utilization of human resources in high schools.

A random sample of 23 high schools which included 166 teachers in the Rustenburg district was chosen. From each school, eight randomly selected teachers including the principal were selected.

The empirical investigation conducted revealed that human resources utilization, which is the future workforce needs in terms of size and skills for major groupings and organisations such as educational institutions and the correct placements. The study also revealed that in practice teachers who have trained as primary teachers are presently teaching in high schools, which is a great anomaly.

The study finally revealed that some high school teachers and principals are not well utilized regard to qualifications and school categories in the Rustenburg district schools and that this is a challenge that need the attention of all stakeholders.

Finally, conclusions were drawn with regard to data gathered from the literature as well as empirical research findings. In this study four recommendations are made with regard to research findings.

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CHAPTER 1

ORIENTATION

1.1. Introduction

Planning is one of the most important tasks of an educational leader and it forms the basis of all other management tasks. Planning is an intellectual activity because it involves future activity to achieve certain objectives. It is a management task which is concerned with deliberate reflection on the objectives of a particular organisation. For an educational institution to succeed, there need to be proper planning for, and utilization of its human resources and proper utilization (Van der Westhuizen, 1991:137). It is of great academic and professional significance to generate numbers, types and quantity of human resources that will be available at the required time by a particular social organisation or learning institution (Burack and Mathys, 1982). In other words the right people must be employed at the right time and at the right place (Burack and Mathys, 1982:2). According to Legotlo (1994) human resources need certain essential skills in order to survive; hence the research topic focusses on the planning and utilisation of human resources in high schools in the Rustenburg district of North West province.

In this chapter attention is focussed on the following: Statement of the problem, significance of the study, purpose of the study, research methodology, data analysis and definition of terms.

1.2. Statement of the problem

Human resource planning could be defined as a strategy for the acquisition, utilization, empowerment and retention of an enterprise's human resources (Bird, 1989 :185). Effective human resource planning is a process that ensures that the organisation or institution has the right people at the right time. Employees or teachers in this instance are regarded as valuable resources . If well utilized, human resources will contribute significantly to organisation or institution (Burack and Mathys, 1987).

In the early 1970's in the United Kingdom (U.K), many companies and social organisations were planning significant expansion in the factories and educational institutions.

During this period such organisations were quick to realise that the key to success was an adequate supply of appropriately skilled people who should be utilized properly. This led to the emergence of human resource planning as a personnel tool. Human resource planning is in essence a process of ensuring that the correct numbers of human resources are available at the right time and at the right place (Parker and Caine, 1996).

In improving services in order to regain a competitive edge, many organisations and institutions in Virginia in the United states of America (US) restructured their organisations and re-evaluated the services they provided to their employees. The aim of this exercise was to explore the extent to which human resource planning could contribute significantly to the improvement of organisations and institutions in general (Sinnette, 1996:133).

Furthermore, in this world of rapid changes, where curriculum is experiencing an ongoing and never-ending process of development, schools find themselves in a constant mode of transition. Caught in a period of increasing expectations and decreasing resources, schools have turned to strategic planning to help them chart a course for the future concerning human resources (Paul, 1996:110).

As a result of apartheid in South Africa, the existing situation in human resource planning, utilization and development is one marked by incoherence, inefficiency, inequity, high costs and poor quality. It is therefore very important that human resource planning programs be put in place to alleviate serious problems and predicaments in which our employees as teachers find themselves (Arnott and Chabane, 1995:4). Practical strategic approaches, strategic issues, technological change, human resource planning activities and programs that are workable, acceptable and supportive of good performance are implemented (Legotlo, 1994).

According to Castetter (1981) human resource planning is employed to influence personnel behaviour towards achievement of a system, unit and individual goals. Proper human resource planning and utilization thereof will help resolve human resource problems and satisfy the expectations of human needs. It should be emphasized that people or teachers

are the most important assets. Furthermore, planning is the school system's most effective way of projecting its intentions and the most reliable method of achieving its mission.

According to the Human Sciences Research Council (HSRC), (Arnot and Chabane, 1995) there are 275 institutions providing teacher education in South Africa and more than 78 000 students country-wide enrolled for teacher training in different institutions in 1994. The annual output of newly qualified teachers in South Africa according to H.S.R.C. is approximately 30 000. According to Arnot and Chabane (1995:52), nationally there is an oversupply of teachers if one uses the government recommended ratios; that is Primary 1:40 and Secondary 1:35. The Country (SA) has the physical capacity to produce enough teachers for its needs (Hofmeyer and Hall, 1995). This is the case in most provinces, except Kwazulu Natal and Mpumalanga provinces that are experiencing shortages of teachers at both the primary level and Secondary levels, North West Province at the primary level and the Northern Cape at the secondary levels. Pupil enrolment projections, however, show that there should be a greater emphasis on training secondary school teachers for the country's needs after the year 2 000 (Arnot & Chabane, 1995). Still, the most important question is whether this production of teachers in the country is correctly and properly planned and utilized?

Recent trends in education, indicate that the teacher population is increasing every year except in a few provinces mentioned above. This is evidenced by the teacher colleges which have mushroomed in the Republic of South Africa. For instance in the North West Province there are seven (7) registered colleges of education. Besides this, in the two universities, namely the University of North West and Potchefstroom there are faculties of Education in which prospective teachers are being trained, while there are also technikons training student teachers for technical and commercial subjects, who are also to be absorbed by the teaching fraternity.

Regarding teacher utilization, it is clear from research that there is considerable misutilization of teachers in South Africa (Arnot and Chabane, 1995). Because of the rapid expansion of secondary schooling during the last two decades, many teachers, who were trained for the primary level have been moved to secondary schools. Good teachers without management training have been promoted out of the classroom into management positions (Arnot and Chabane, 1995). These teachers must be given management courses so that they can be good managers. Furthermore, many teachers have been

employed to teach in the scarce subjects without the requisite qualifications. This is particularly so for Mathematics and Science (Hofmeyr and Hall, 1995:33).

In 1996 the Department of Education and employee organisations implemented the right sizing, redeployment and the severance package strategies that did not produce the intended results because the employer-employees organisations did not consider the following salient points:

(R.S.A; 1996:2)

- the demographic trends to determine areas of population shifts or areas of population growth;
- the profile of a person who is redeployable (many teachers were, for various reasons, not redeployable),
- That occasionally right sizing became downsizing; and
- the compilation of a proper database to determine the parameters within which redeployment is feasible.

The time has come, however, for all stakeholders in education to realise that there is no substitute for proper planning. The problem of the voluntary severance packages, redeployment, right-sizing, the ongoing mass training programmes of student-teachers country-wide and the unemployed teachers from 1995-1997 is a sign of lack of controlled planning and proper utilization of human resources (R.S.A, 1996:1).

It should also be noted that human resource planning cannot be done in isolation. It must be an integral part of the overall departmental plan that includes consideration of the Department of Education in terms of the new Curriculum 2005, policies, finances, capital, equipment, physical resources, affirmative action and gender issues. Furthermore, human resource planning involves the following:

- Assessing where you are now;
- Deciding where you want to go;
- Forecasting what human resources you will need to reach your target or aim;
- Setting up and implementing a plan to acquire and retain the human resources.

As a hypothesis, the following statements can be made: The absence of proper planning of human resources can bring the whole education institution to a standstill. This research will focus on Rustenburg District high schools, in particular, to see how human resources are distributed and how they are put to use. According to Burack and Mathys (1992) failing to plan is planning to fail. There is no substitute for proper planning (Salaman, 1993).

The study attempts to answer the following questions:

- Are the teachers well deployed in the high schools in the Rustenburg District?
- Are there indications of over-utilization or underutilization of teachers in high schools, and what could be the underlying cause?

1.3. Purpose of study

1.3.1. Aim1: To determine the nature and scope of the issues in human resource planning and utilization .

1.3.2. Aim 2: To determine from literature, strategies and models in planning and utilization of human resources.

1.3.3. Aim 3 : To determine empirically challenges and issues facing administrators and planners in the planning and utilization of human resources .

1.4 Research Methodology

1.4.1 Literature Study

A thorough study of secondary and primary sources was done in view of gathering information on planning and utilization of human resources.

1.4.2 Empirical Investigation

1.4.2.1 Questionnaire

A questionnaire was developed and pretested. It consisted of closed ended questions. The purpose of the questionnaire is to gather information from high school teachers about planning and utilization of human resources in Rustenburg District.

1.4.3 Population and Sampling

1.4.3.1 Target Population

The Rustenburg District of education consist of seven circuits, with a total of forty-five high schools . The distribution of this type of category of school is not equal due to geographical boundaries. This also implies that the number of teachers in each circuit is not equal. The total number of teachers is 1075 and the total number of pupils is 27458 (see Table 1.1).

Table 1.1

Distribution of high schools, teachers and pupils in the Rustenburg District per circuit (1997 Snap survey High schools)

Circuits	Mabeskraal	Mantsere	Mogwase	Phokeng	Rustenburg	Tlhabane	Tsitsing	Total
No.of schools	6	6	6	5	7	9	6	45
No.of teachers	115	77	138	120	143	306	176	1075
No.of pupils	2701	2294	3891	3285	3763	6958	4566	27458

(1997 Snap Survey High Schools by A. District Manager:Rustenburg District Office).

1.4.3.2. Sampling

1.4.3.3.

A random sample of 23 high schools was chosen. From each school a sample of eight teachers and the Principal by virtue of his or her position were selected to participate in the study .

1.5 Data analysis

With the help of a statistical consultant of the University of the North West, computer aided analysis was employed.

1.6 Definition of terms

1.6.1 Planning

Planning is the work a manager does to master the future because through careful planning set

objectives are realized. Planning further means designing and creating regulated activities with a view to future needs (Van der Westhuizen, 1991:137) According to Marx (1981:211) planning is the management task concerned with deliberately reflecting on the objectives of the organisation, the resources, and also the activities involved, and drawing up the most suitable plan for effectively achieving these activities.

1.6.2 Human Resources

Human resources refers to personnel or the labour force, in this case, it comprises a well and appropriately trained and skilled labour force (teachers). Human resources is further explained as future workforce needs as for size and skills for major groupings, organisations and educational institutions. In this study human resources are teachers and principals of high schools.

1.6.3 Human resource planning

Human resource planning as a process in personnel management is undertaken to ensure that a school district has the right number of people, with the right skills, in the right place, and at the right time. According to Rebore (1991:62). Human resources planning is a process for determining and assuming that organisations like schools, colleges or universities will have a sufficient number of qualified persons available at the proper times, performing jobs to meet both organizational and needs and provide satisfaction to employees.

1.6.4 Utilization

Utilization means using people and teachers fruitfully and wisely. It further means correct placement of teachers according to qualifications and experience.

1.6.5 High schools

High schools are schools with grade 12 as the final grade and where formal education and a culture of teaching and learning are taking place.

1.7 Chapter headings

Chapter 1	Orientation
Chapter 2	Review of literature
Chapter 3	Research method
Chapter 4	Analysis of data and interpretation
Chapter 5	Summary, recommendations and conclusion

REVIEW OF LITERATURE

2.1. Introduction

According to Legotlo, (1994) human resources need certain essential skills in order to survive hence the researcher's concern, and the research topic, "**Issues in the planning and utilization of human resources in High schools in the Rustenburg District of the North West Province**". Many teachers have been employed to teach in the scarce subjects without the requisite qualifications (Arnott and Chabane, 1995). This is particularly so in the case of mathematics and science (Hofmeyer and Hall, 1995:33). The lack of proper human resource planning and utilization in high schools prompted and persuaded the researcher to investigate this research topic, with the hope that in future all stakeholders in education will employ and hire the right number of people, at the right time.

The objective of this chapter is to give a brief review of literature on issues in the planning and utilization of human resources in both developed and developing countries.

2.2. Further definition of major concepts

2.2.1. Human resources planning

Human resources planning as a process in personnel management is undertaken to ensure that a school district has the right number of people, with the right skills, in the right place, and at the right time (cf 1.3.1).

2.2.1.1. Planning and meaning of planning

Planning is defined as the process of preparing for change and coping with uncertainty by formulating future courses of action. Rebores (1991:62), defines planning as the management task which is concerned with deliberately reflecting on the objectives of the organizations, the resources, as well as the activities involved, and drawing up the most suitable plan for effectively achieving these activities. Planning is the work a manager does to master the future because through careful

activities with a view to future needs (Van der Westhuizen, 1991:137).

The definitions of planning are as many and as varied as there are writers and speakers on the topic. Jones and Watters (1994) define planning as the process of preparing a set of decisions for action in the future directed at achieving goals by optimal means. Planning is a strategy for future action. A good planning process can become a major means for the school administrator to communicate with the system and it can be used as a strategy to influence those whose support is necessary for the success of the school system's work. Lastly, it can provide an up-to-date, accurate database for the school system on which sound decisions may be made. This database will change constantly, reflecting the realities of the organization's internal and external environment in areas such as human resources, finance, instruction and curricular changes.

2.2.1.2. Short-term planning

Short-term or immediate-planning is of a limited time span developed to accomplish specific objectives. The usual time frame for planning in education is often restricted to preparing for what is to take place the next day, week, or semester. Generally, the longer time frame is used for planning the calendar or the school year. This type of planning is widely used, but it does little to get the administrative process to change from previously existing plans or to increase involvement with greater time commitments from the top-level administration in the planning process. It does however promote stability. But what is needed is greater emphasis upon strategic planning, which is discussed below.

2.2.1.3. Strategic planning

In 1980, Cook defined strategic planning as a voluntary commitment to generate rational decision about the development of resources towards fixed goals and functions. He states further that strategic planning is a prescription that is formulated by the combined expertise within the organisation and represents a consensus plan derived through the application of basic principles of participative management. A strategic planning approach for education is provided by Jones and Walters (1984), who define strategic planning as long-range planning with a vision. They present a strategic planning process that covers nursery school through higher education. This long-range planning process must start with a statement of mission, which should be brief but adequate enough

planning process must start with a statement of mission, which should be brief but adequate enough to spell out the district's commitment to selective academic, and career outlines for students and faculty. The mission statement should be the basis for planning and decision making for the school districts. Finally, with regard to strategic planning, it is essential that there be a relationship between strategic planning and human resources planning and that the two aspects be well understood. Human resources directors must be concerned with matching human resources planning with strategic educational planning. Following, therefore is a discussion of the relationship between the two concepts.

2.2.1.4. Strategic planning and human resources planning

Jones and Walters (1994) explain that strategic planning is setting management organizational objectives and developing comprehensive plans to support those objectives. It further involves deciding on the priority of the organization, its process, and the inter-relationship with human resources. Human resources planning and strategic planning become effective when there is a reciprocal and interdependent relationship between the two functions (Jones and Walters,1994). Strategic planners should recognize that their decision affect and are affected by human resources. Human resource directors should recognize the contribution they make to organizational growth and development and should develop programs that enhance the district's educational mission. In any type of planning where human resources are concerned, there comes a time when one must define the difference between what is and what is desired. The directors of human resources should provide the leadership needed for planning that will determine the human resource needs of the system.

Rebore, (1991:24) defines planning as a process common to all human experience. Before embarking on a journey, an individual must understand where he or she is, know where he or she wants to go, and decide how best to get there. In a simple form this exemplifies, the essence of the process as it is applied in educational organizations.

Through the process of human resource planning, a school district ensures that it has the right number of people, with the right skills, in the right place, at the right time and that the people are capable of effectively carrying out those tasks that will aid the achievement of the organization's

taken for granted, and yet they are the force that directly affects the main objectives of a school district - to educate children. Human resource planning thus translates the organization's objectives into people requirements.

Human resource planning, as a process ensures the smooth development of an organization. "We assess where we are; we assess where we are going; we consider the implications of these objectives on future demands and the future supply of human resources; and we attempt to match demand and supply so as to make them compatible with the achievement of the organization's future needs (Rebore, 1991).

2.2.2. Human resource planning and utilization

2.2.2.1. Human resource utilization

Human resource utilization implies measures both of human capacity and appropriately professionally trained and skilled qualified teachers which may be defined as future workforce needs in terms of size and skills for major grouping such as educational institutions and the correct placements, distribution and the best of available human resources (Rebore, 1991; Brewster & Tyson (1991:15)).

2.2.2.2. Importance of human resource planning

Planning is humanity's way of projecting intentions. Planning represents a most appealing and challenging endeavor because it deals with concepts of the future, future problems requiring imagination and choice, deliberate forethought, and attainment by design. Planning is recognised as an organization's most reliable way of realizing goals (Rebore, 1991). Planning for human resource is an effort to set a course of action and to guide the action toward a set of expectations. The nature of planning for human resources is a decision-making process, it is a special kind of decision making :

- (a) planning is something we do in advance of taking action, that is, it is anticipatory decision making;
- (b) planning is required when the future state that we desire involves a set of interdependent decision, that is, a system of decisions;
- and (c) planning is a

decision, that is, a system of decisions; and (c) planning is a process directed toward producing one or more future states that are desired and are expected to occur unless something is done (Rebore, 1991).

The planning process and derivative plans are designed to minimize random behaviour and dysfunctionality and to facilitate coordination of goal-directed activity (Castetter, 1992). It is worth noting that a school system's human resources needs are linked to its strategic objectives. Castetter (1992:30-33) notes that the planning process both short- and long-term, is a crucial component in helping to articulate the system's future direction, in underscoring the changes in a mix of human resources needed, and in developing a framework within which these resources are utilized effectively. After a brief discussion of the importance of human resource planning, the next step to be discussed is strategic planning and human resources (Castetter, 1992).

2.2.1.4. Strategic planning and human resources

According to Jones and Watters (1994), strategic planning and human resources are given high status in writing and speeches related to education. Through planning, one can anticipate and get ready for whatever the future has in store. It is true that planning is significant and needed in all phases of education.

2.3. ASSESSING HUMAN RESOURCE NEEDS

The process of assessing human resource needs has four aspects. Firstly, human resource inventories must be developed to analyze the various tasks necessary to meet the schools district's objectives; the tasks are then matched against the skills of current employees. Second, enrollment projections must be developed for a five-year period. The extreme mobility of the American population has made these aspects increasingly important over the past twenty-five years. Third, the overall objectives of the school districts must be reviewed within the context of changing needs. At a time when school district budgets are tight all but the wealthiest districts must establish priorities in meeting objectives. Fourth, human resources inventories, enrollment projections, and school district's objectives must be organized into a human resources forecast, which becomes the mandate of the personnel department.

2.3.1. Human resource inventories

Human resource planning begins with the development of a profile indicating the status of current human resources. The profile is generated through forms completed by employees, verified by supervisors, and finally sent to the personnel department. This form should include name of employee, age, date employed within the school district, gender, job title, place of employment with the dates when completed, special skills, and, for instructional personnel certification.

From the planning perspective, this information is valuable not only in determining what skills are available but also in developing new instructional programs and support services. The human resources profile also helps personnel administrators as they carry out other personnel tasks such as recruitment and staff development. The profile also provides crucial information for identifying weakness as that may exist in the school district's ability to meet its objectives. For example, reviewing data under the "date employed" section will help the administration analyze such problems as staff turnover and job dissatisfaction. The "age of employee" information helps administrators formulate strategies for recruitment by identifying those individuals approaching retirement age. Accurate data are essential to every aspect of the personnel process and human resource profiles are an effective method of presenting such information (Rebore, 1991:25-26).

2.3.2. Enrollment prediction

Because educational institutions are service organizations, enrollment predictions is an essential aspect of human resource planning. Unless a school system makes an effort to predict decline or increase in the number of students to be served, it may unexpectedly experience half-filled classrooms and a surplus of teachers or overcrowded classrooms and a shortage of teachers.

The major question to be answered by an enrollment prediction is, how many children are expected to attend a particular school over the next five to ten years? Many methods can be used to forecast enrollments. Among the most popular is the "percentage of retention" or "cohort survival" technique. This method is predicated on birth rates and the historical retention of students. However, another method is available that highlights enrollment trends before the statistical time required by the former technique has elapsed. The Keogh Indicator Survey Scale uses social, financial and residential factors for critical analysis of a school.

financial and residential factors for critical analysis of a school.

2.3.3. Reviewing school district objectives

The future objective of a school district is to determine future human resources needs. The number and mix of employees are determined by the type of services called for by organizational objectives. Establishing objectives is the prerogative of the board of education. The board, however, must rely on the advice of the school administration as it establishes objectives that will best meet the educational needs of the community (Rebore, 1991).

The review of current objectives in light of future educational needs is a cooperative task. In a district operating under the organizational structure, the assistant superintendents for secondary education, elementary education, and instructional services would have the primary responsibility for determining future objectives(Rebore, 1991).The assistant superintendents for personnel would develop a human resources forecast to meet the projected objectives developed by the three other assistant superintendents. The assistant superintendent for administrative services would then translate the objectives and human resource needs into a fiscal plan. The superintendent of schools is charged with prioritizing the objectives and recommending them to the school board for approval. This review of objectives is not a one time task but rather a continual process. The objectives, however, should be established for at least a five - year period and if need occurs, could be revised into a new five - year plan each year. Thus a set of objectives is always in effect for a set period of time (Rebore, 1991).

2.3.4. Human resource forecasting

When the objectives have been reviewed and an overall human resource forecast has been established, a more explicit projection of future human resource needs must be developed. There are five commonly accepted methods for computing future needs. (Rebore, 1991).

- Expert estimate : Those staff members in the school district most familiar with employment requirements use their experience and judgment to estimate future needs.
- Historical comparison : By this method, past trends are projected into the future.
- Task analysis : Each person in each type of position is studied to determine demand. This

method is sometimes effective in uncovering specific quality shortages within a school system.

- Correlation. Human resource requirements fluctuate in relation to such variables as decreasing enrollment, fiscal resources, and new programs. A correlation of the variables can be statistically formulated.
- Modeling. This usually refers to decision-making models. However, it may be broadened to include reviewing the programs in other school systems, and how they are organized in order to formulate a model for staffing.

Whatever method or combination of methods is used, the human resource inventories on current employees can provide data about the age, gender, education, certification, and type of position within the school district (Rebore, 1991:30-31).

2.3.5. The supply of human resources

An increase in a school system supply of human resources can come from two sources, newly hired employees and individuals returning from absences such as maternity, military, and sabbatical leave (Rebore, 1991). Both types of increases are relatively easy to incorporate into a human resources forecast because hiring is controlled and leaves are usually for set periods of time. Decrease in school system's supply of human resources, however are more difficult to predict. Deaths, voluntary resignations, and dismissals are unpredictable except in the broadest sense, as through statistical averaging. However, some of the decreases, such as sabbatical leaves, can be controlled; and others such as retirements are easier to predict.

The available labour force has a significant effect on human resource forecasting (Rebore, 1991). Graduates from high schools, colleges, and universities replenish the supply of labour necessary to carry out the mandate of public administration. In recent years, however, educational organisations have experienced a decrease in the number of applicants for mathematics and science teaching positions because of the higher wages and advancement opportunities available in private business and industry. A major source of employees other than recent graduates includes older individuals, particularly women reentering the work force and seeking full-time or part-time employment, to supplement family income for the family. Divorce rates and high cost of living are key factors contributing to the number of women reentering the labour force (Rebore, 1991).

2.3.6. Matching needs with supply

A final activity in human resource forecasting is to match the school district's future human resource needs with current supply. This will pinpoint shortage, highlight areas of potential overstaffing, and identify the number of individuals who must be recruited from the labour force to satisfy future needs.

Lastly, human resource planning ensures that we have the right number and mix of people to meet the school district's future needs as determined by its future objectives (Rebore 1991).

2.3.7. Teachers workload and professional mix

2.3.7.1. Teachers workload

According to Webb et al., (1994:227), staff assignment requires that careful attention be given to teacher's work load. Without such consideration, inequities in the work load are certain to persist and personnel who are most qualified to carry out an effective educational program in the school often are so over burdened that their efforts are reduced to a mediocre level. Webb et al, further explains that equity of assignment is not the only personnel consideration that undergirds the importance of teacher load. Load reductions are advisable in certain situations; particularly in the case of individuals new to teaching. Maximization of human resources is seriously inhibited if there is inequitable distribution or unwise allocation of load. A comprehensive examination of the teacher's work also serves to assess what teacher actually do in meeting the responsibilities of their assignments. The actual load of the teacher includes among others, factors such as the number of subjects taught, extracurricular or additional duty assignments, and, at the elementary school level, the number of grades taught (Webb et al, 1994).

2.3.7.2. Professional staff mix

Bird et al., (1983) explains a portfolio mix of human resources as one in which personnel with specific skills, abilities, and expertise can be moved among units of the organization to achieve the organization's objectives. Specifically, procedures are established so that personnel can be transferred among units of the organization to optimize the use of their talents. Developing the mix involves balancing the best human resource talents with program needs to achieve the strategic

objectives of the school system. For example several attendance areas of a school system may be growing rapidly while several others are struggling with enrollment declines. An analysis of the professional staff mix would take into account consideration of strategic objectives of both the school and the individual schools involved to determine the optimum mix of professional staff. This analysis may suggest changes in staffing to help achieve strategic objectives.

There are special considerations that are frequently given to the professional staff mix (Webb et al, 1994). One special consideration relates to those school districts that are under a court order to provide a particular racial blend of professional staff members in all schools. Another district may be required to balance the professional experiences of faculty members among the schools of the district. Apart from court order, it is often worthwhile educationally to balance staff on the basis of age, ethnicity, gender, and teaching load. Despite the need for improving the professional staff mix in a school system, the reality faced by many school organizations may mitigate against such efforts and therefore it is very important that human resource administrators exercise careful planning, expert leadership, and sensitivity to realize such changes. School principals must also be very careful when coming to placement and effective staff utilization (Webb et al., 1994)

2.3.8. Placement and utilization of staff

Rebore, (1985) notes that the placement and effective utilization of teachers is the most difficult task facing the school principal and his/her deputies. Certain aspects of placement are given. For example, in most states in the U.S.A. teachers are permitted to teach only the grade level or subject matter for which they are licensed. Moreover it is better to give teachers assignments they desire and are qualified for by virtue of academic preparation and or experience. However, Rebore, (1991) feels that to do so may cause some difficulties. Firstly, sometimes there are positions that must be filled by staff members who possess only minimal qualifications. Secondly, on occasion, qualified employees / teachers may not like their assignments.

In either case, the building principal must take the decision about staff assignments based on (1) the needs of the students, (2) the effective implementation of the programs and the best use of available human resources. There is no way to be infallible in effectively placing and utilizing the staff. In the final analysis, such decisions must be made by the principal in collaboration with assistant

final analysis, such decisions must be made by the principal in collaboration with assistant principals and departmental Heads. Clearly, the principal's experience and professional judgment will be involved and the next step will be the determination of qualifications for each position in an institution.

2.3.9. Determining the qualification for each position

According to Jones and Walters (1994:55) the mission of an organization must be translated into a description of the work to be done to achieve that mission. Secondly, the work must be partitioned into progressively smaller sub-units, ultimately to the point where it can be expressed as jobs that can be assumed by individuals. Finally, once an individual job is defined, one must determine the necessary qualifications a candidate for assignment to that job should possess. The combination of skills, knowledge, experience, and personal characteristics needed must be delineated. And decisions must be made about what proxies and measures are acceptable indicators that a candidate holds the desired qualifications.

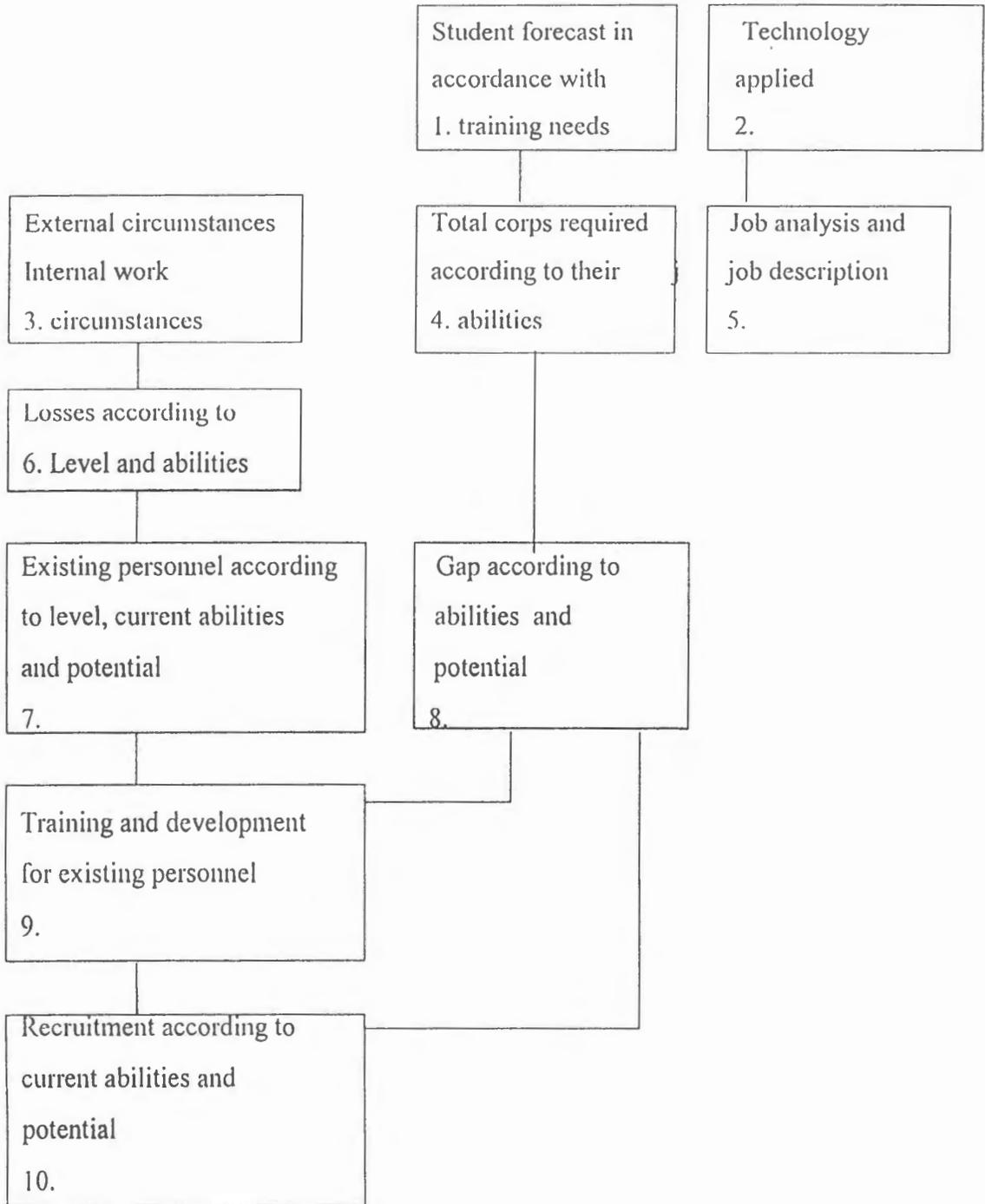
Jones and Walters (1994:55), went on to say that in the context of a discussion of job analysis, the qualifications to be a teacher in a specific job will be highly unique. Teachers as a broad class of workers may be expected to possess all qualifications at the expected level of competence for a given job. The school, then, should be prepared to accept the most promising candidate with the commitments to provide that person with appropriate means to acquire and develop the required qualifications. After the foregoing discussion, it is now appropriate to discuss the process of planning and utilization.

2.4. HUMAN RESOURCE PLANNING PROCESSES

2.4.1. Gerber et al.'s Human resource planning process

Gerber et al (1995:104-106) explain the human resource planning process step by step as shown in figure 2.1.

FIGURE 2.1. HUMAN RESOURCES PLANNING PROCESS



Source : Gerber et al, 1993:2

- Block 1 indicates the beginning of the process. In each of the following 10 years, on demographic basis, it is calculated how many students the faculty can expect. The number

integrated with the institutions own statistics to see how many will be enrolled for each of the courses in the faculty in each year. After centrally calculating these figures in the faculty and passing them to the departments for improvement and use in their planning process, as the rest of the process takes place per department.

- It is important to note that block 3 is also done by the faculty for and incorporation with each department. In block 3 the working conditions and the supply/demand situation outside the institution or organisation are investigated and the department's appeal to academics is determined. The aim is both to estimate the possible losses to the outside and to investigate the possibility of attracting new people from outside. The division of this block is to indicate that the external circumstances are out of the faculties control, but that various possibilities with regard to how things look within the institution/school can be followed up.
- Block 5 is an independent point of departure and goes over into block 6, where it is individually calculated how many academics the institution is expected to lose. This takes place on the basis of the information in block 7 which states how many people of each type are in the academic departments. If there is a 10% loss of cost accountants, and there are 20 of them, then the loss will be two as opposed to a loss of one if there are only 10 of them. In the same way the loss of tax experts may be 25%, which gives another result again.
- According to block 7 which is that "database" within the department refers to a list of the various categories and how many people there are in each. A page is allocated to each of the 10 years to be planned for. On the first page, the following years are filled in by subtracting losses (according to block 3 and 6), adding (according to block 10) and shifting (according to 9).
- In block 10 it is determined how many people will be recruited in each category. The categories must be multi-dimensional to indicate potential. Sometimes, for example, teachers must be recruited only to act as markers and to remain markers. In such cases the potential for further development does not need to be high. This can apply at various job levels. These figures are

carried over to the page that represents the condition at the beginning of the following years.

- Block 9 shows the shifting of staff between categories. The result of this is taken over to the page that gives the projected condition for the beginning of the following year.
- For each of the following 10 years, a page is calculated in the same manner : starting condition in the various categories minus losses plus recruitment and shifting of existing staff due to personal development or due to decline or stagnation.
- The educational model and technology from which the job descriptions in block 5 flow is indicated in block 2. A department that writes programs to mark the work of students and provides it to the students on disk at the beginning of the years, has quite different job descriptions from one that corrects large numbers of assignments.
- In block 4, the student numbers are added up according to their year courses and the technology used to determine how many lectures are required in each category in the given year. This is carried over to block 8, where the input of block 7 for the same year is also added. A desired personnel matrix for the tenth year and work backwards, or whether it wants to work forward from the present, etc.

Now that Gerber et al's (1995) human resources planning process has been determined and explained, Castetter's (1992) human resources will be discussed here-under :

2.4.2. Castetter's human resource planning

Castetter's planning tool referred to as a process, can be employed in dealing with the complexities of human resource planning as the system is being guided from the present into the future process as the term is used here, refers to a series of progressive and interdependent steps designed to (a) enhance function, (b) establish a systematic approach for coping with routine and non-routine personnel problem solving. An example of a planning process for the school system's resources is

illustrated in figure 2.2. The first step in the process, goals for the systems human resources, is the subject of the discussion that follows.

FIGURE 2.2. A SEQUENTIAL MODEL OF THE HUMAN RESOURCE PLANNING PROCESS.

Phase	Activity
One	Clarify, formalize, and communicate goals and expectations for the system's human resources.
Two	Assess the overall state of the human organisation.
Three	Develop a strategic plan.
Four	Implement the strategic plan.
Five	Monitor, evaluate and adjust the strategic plan.

(CASTETTER, 1992:32)

Phase One : Goals for the system's human resources.

If there are no set of values to guide an institution, in dealing with its human resources, then it would be very difficult for such an institution to administer its affairs in an orderly and human manner. A goal structure must be set in order to form the foundation around which to base the planning analysis required by the personnel/human resource planning process.

Knowledge gained in classifying broad system and personnel function goals is used to engage phase two of the personnel planning process/human resource planning process (as shown in figure 2.2. Castetter (1992) frequently referred to this step as an organizational diagnosis. As detailed in the section that follows, phase two is the internal and external environments. This information is a major conclusions concerning the present condition of the system's human resources, and to develop assumptions about conditions that need to be created with the system to achieve the desired end results.

Phase two : Assessment of the current human resources condition.

With the following perceptions about schooling in the United States, according to Castetter (1992), there is little disagreement : (a) school systems, whether small, medium, or large, are in need of considerable improvement, (b) all systems engage in some form of planning , whether formally or informally, (c) a systematic approach to planning creates the likelihood of educational improvement,

and (d) personnel function can be a major force in the organization's thrust to bring about advantageous changes to position holders, work groups, the school enrollees and the general public.

The planning process model shown in figure 2.2. indicates that phase two is aimed at assessing the current condition of a system's human resources in order to plan a course of action designed to effect desired improvements. More specifically, phase two is aimed at developing analysis answers to questions such as :

- What modifications in the educational program and supporting services are necessary to realize desired educational outcomes.
- What is the capability of the present staff items of numbers, skills, abilities, and attitudes to meet changes in the educational program?
- What is the projected future demand for school personnel etc.?

Phase three : Development of a strategic plan.

Human resources planning process in phase one and two includes (a) identification of organizational and personnel objectives and (b) formation of data for use as tools in planning how to achieve future system goals. Phase three involves drawing inferences, considering planning options and making personnel decisions based on information derived from phase one and two.

In decision making for human resource planning, many factors are involved. Which at the same time are complicating the whole process of decision making. For example :

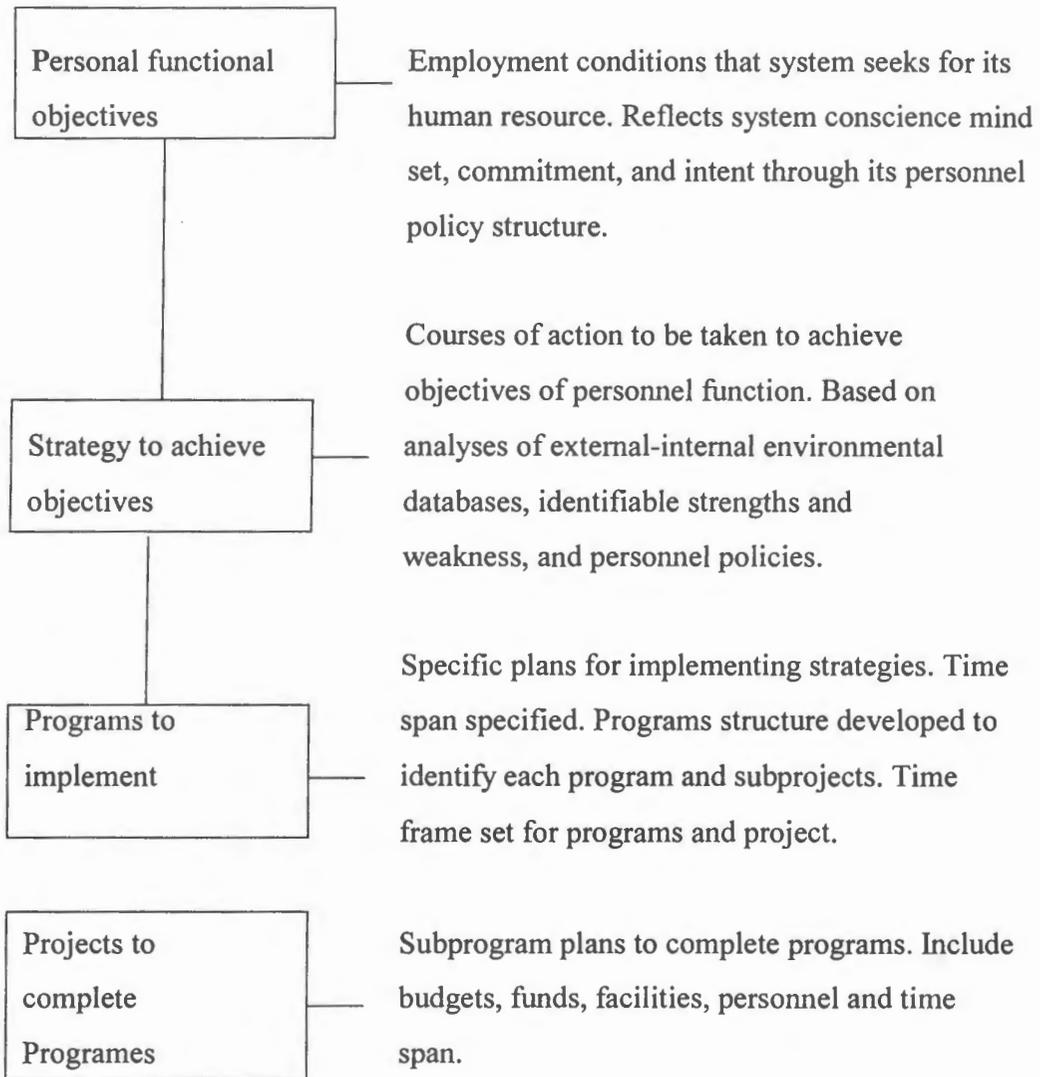
- What are the planning implications of the pupil enrollment forecast?
- Will there be a shortage or surplus of system personnel to meet future needs?
- To what extent do incumbents have the skills, abilities, and attitudes to fill projected positions?
- To what extent should existing jobs be redesigned? New jobs designed? and many other questions.

Phase four : Implementation of the strategic plan.

Phase four of the human resources planning process presumes that there is organizational commitment to implement the design of the strategic development plan. As illustrated in figure 2.3. implementation strategy takes into account objectives, strategies, programs, projects, timing of activities, delegation of responsibilities, and allocation of resources to undertake specified courses of action.

It should be noted that school systems differ in many ways, sizes, location, leadership, resources, quality and quantity of personnel, instructional technology, complexity, stability, internal-external environments. It is the responsibility of each school system to determine how the personnel process can be performed most effectively and efficiently. The planning process model shown in figure 2.2. provides a framework for analyzing problems related to the personnel function and the steps involved in developing approaches to achieve long-run objectives.

FIGURE 2.3. SEQUENTIAL IMPLEMENTATION OF PERSONNEL CHANGE STRATEGIES.



(CASTETTER, 1992:53)

Phase Five : Monitoring, evaluating and adjusting the strategic plan.

Castetter’s final phase in the human resource planning process is to determine the appropriateness of plans to meet projected conditions and the extent to which performance conforms to plans. Inherent in the control function are three closely related steps that form the basis of this phase : (a) reviewing plans (including goals, objectives, programs, and standards) (b) checking results against expectations, and (c) adjusting to correct deviations from plans. Ideally, every plan that the school

system puts into operation should have built-in-means for judging its effectiveness. Viewed in this manner, monitoring, and evaluating the effectiveness of plans is an omnipresent function of school administration, an aspect of the administrative process designed to keep means and ends imbalance. Human resources planners need to know :

- How feasible are the planning assumptions on which the personnel function is based?
- In the current organizational structure conducive to system effectiveness?
- Are the positions being filled according to position guides?
- What steps have been taken to implement system wide development and career paths for personnel?
- Are the members and quality of personnel satisfactory?
- Are personnel deployed, balanced, and utilized effectively?
- What initiatives are needed to adjust differences between actual and expected planning outcomes?

Finally, it should be noted that human resource planning is a cyclical; operation that probably will never attain perfection. Periodic revisions of plans and the assumptions on which they are based will always be necessary. Nevertheless, if the planning process is carefully structured, implemented, and controlled, there is a good chance that the school system will have sufficient personnel available to meet its personnel requirements and that it will not have to endure constant organizational crises created by lack of qualified people to perform the variety of tasks essential to its purposes.

After this brief discussion and explanation of Castetter's human resources planning process, the following sub-section will examine Webb's human resources process.

2.4.3. Webb's human resource process

A few human resource processes will be briefly discussed under the following sub-headings, (a) Human resources utilization, (b) Human resources development and (c) Human resources environment.

2.4.3.1. Process of human resources utilization

2.4.3.1.1. Human resources planning

Concerning human resource planning, the following two important questions must be asked : How does the school system determine its direction and priorities? Secondly, what kinds of data and information are essential for the successful completion of the human resources tasks and responsibilities? It should be noted that it is the human resources planning process that will answer these questions. The following are the purposes of resources planning i.e. (1) to clarify the objectives and mission of the organisation, (2) to determine in advance what the organisation and its parts are to do, and (3) to ascertain the assets on hand and the required resources for accomplishing the desired results. The essence of effective human resources planning is that it helps the school system to determine what it wants to be and provides a blueprint for guiding action. The importance of this type of process is to avoid guesswork and efficient accomplishment of goals. It is very important to note that planning constitutes a purposeful set of activities that focuses available resources upon the achievement of school goals.

Webb et al (1994) further state that planning is not synonymous with the plan, but that a plan is a product of the planning process. Again, he points out that planning on the other hand, is a continuous, ongoing process characterized by flexibility and subject to change. Effective planning forms a foundation for decision making. Effective planning encourages responsive administration and capitalizes on employee talents by establishing goals that elect the most effective performances from individuals in the organization. According to Webb et al; planning is a comprehensive, continuous process that must remain flexible and responsive to changing conditions. The following activities are included within the human resource planning process : developing planning assumptions, determining organization relationships and structures, completing inventories of needs, making assessments of labour markets, developing forecast of resources needs, completing projections of students populations, participating in policy development, completing position analyses and position descriptions, and evaluation and orientation on pages.

2.4.3.2. Processes of human resources development

It is vital that personnel in institutions be developed so that aims and objectives of institutions are realized. Human resource planning and the processes of human resources development are important ingredients with regard to the progress of the institution.

2.4.3.2.1. Development of human resources :

To improve personnel competency institutions must do something in order to motivate their employees. Productive programs must be put in place to improve personnel growth and that of the system/institution. The fact that schools will progress as their personnel are motivated to achieve personal and professional growth has direct implications for human resources administration. Clearly, effective school programs are dependent upon the extent to which employees/teachers continue to grow and develop.

Staff development is often the shared responsibility of several units in an educational system, however human resources directors are involved specifically in in-service training, internship programs, monitoring, and external training support programs. The expansion of human resources development process, and the responsibilities of all administrators who supervise personnel is significant. In staff development the following activities concern all school administrators : i.e. the establishment of staff development policies, and determination of special development programs.

2.4.3.3. Process of the human resources environment

2.4.3.3.1. Development of the organizational climate

Webb et al (1994) define organizational climate as the collective personality of a school or school system. It is the atmosphere that prevails in an organization and is characterized by the social and professional interactions of the people. It is the completion of personal and organizational relationships within the school and it is a great concern of the human resources function. It is important in a school or institution that a favourable organizational climate be developed in order

to foster a healthy working environment for employees or teachers, and make the school/institution a better place to work, and finally to have better and positive effects on employee performance.

2.4.3.3.2. Recruiting of personnel

Under human resource processes, human resources planning is closely associated with recruitment of personnel and therefore, recruitment of personnel is briefly described here. According to Webb et al (1994), the purpose of the recruitment process is to establish a “pool” of qualified candidates to meet the needs for the specific position available. The amount of recruitment necessary depends on such factors as enrollment growth and decline, staff turnover, and program design. It should also be clear recruitment is not only a primary responsibility of the human resource function but, when combined with the selection process, is considered by many practitioners as the most time-consuming responsibility. It is indicated that human resources directors in one condition named recruitment and selection processes as using up the greatest amount of their time (Norton, 1989).

In view of the forecasting of teacher shortages through the logos, the recruitment of talented personnel assumes an ever increasing role of importance. Shortages increase the competition for quality personnel and make an effective recruitment program even more necessary. Sources for new talents must be identified and tapped. The recruitment process begins by establishing policy guidelines during the planning process that directs such specific activities as development recruitment resources, implementing application procedures, establishing formal interview and evaluation procedures, and designing appropriate staff involvement strategies for each of these activities.(Webb et al, 1994:53). For the administration of an institution to be effective, the right people must be employed and therefore it is important that human resources administrators and managers must pay special attention to selection of personnel.

2.4.3.3.3. Selection of personnel

Two important questions that need to be asked in regard to selection of employees or teachers are: (1) how does the school system determine the best person for a specific position?, (2) does selection depend primarily on individual perceptions of an applicant's qualifications or are there “tools” that lead to staff selection on a more scientific basis? Selection of the right person for the right job is a basic responsibility of effective human resource administration. Many potential administrative and

staff problems of a school system can be avoided through an effective selection process. More significantly, it should be noted that effective personnel selection serves to reduce the major costs related to the retraining of inadequately prepared employees. According to Webb et al; (1994), selection necessitates attention to matters other than merely filling vacancies. Although placing the right person in the right job is a primary objective, such considerations as staff load, staff balance, and staff diversity are significant for one to note that interviewing, legal compliance, screening, evaluation, and selection decisions are important activities of the human resources selection process.

2.4.3.3.4. Orientation of personnel

Whilst orientation is often given labels such as induction, introduction of employees, pre-service programs, or staff development, Webb et al. (1994) further define orientation as the complex of activities designed to gain congruence between institutional objectives and employees' needs. Orientation begins with the job application and continues on an ongoing basis for as long as the employees or organization views it as necessary. Thus, the orientation process assumes a comprehensive perspective as opposed to the traditional practice of scheduling one or two days of informational session for employees at the outset of the school year. Finally, in the next section the related research findings on planning will be discussed.

2.5. RELATED RESEARCH FINDINGS ON PLANNING AND UTILIZATION OF HUMAN RESOURCES

Education is inextricably related to the social, political, and economic influences of its time, its human resources function is no exception. The progress realized in the development of human resources administration and planning is in part a history of education (Webb et al, 1994). Hathcock (1996), states that these are extraordinary times for the profession of human resources. The demands of the new century pose formidable challenges and exceptional opportunities and therefore people must respond boldly and intelligently towards human resources in education. Guthrie and Reed (1991), state that schools are concerned with educating students and pupils through a process that relies almost exclusively on human resources consisting administration and planning is concerned with security appropriate school staff and managing the general conditions of employment to termination. In this section, therefore, we pay special attention to the related research findings on planning and utilization of human resources by various authors.

With regard to planning and human resources Edmund, (1995), made a study on the strategic planning process and its impact on the audit of planning practice and human resources used in Wisconsin public schools. The purpose of his study was to gather and analyse the perceptions of schools superintendents and school managers about the status of the strategic-planning and human resources and human resources process and its impact on the quality of planning practices used in school systems in the state of Wisconsin. Edmund (1995), investigated the demographic factors of school system size, school system location and type of school system to determine if these factors influenced superintendents and manager's perceptions of planning process and human resource practices. An analysis of the main strategic planning process and human resources factors and their influence on the perceptions of school superintendents and school managers about the impact strategic-planning has on their school systems were also undertaken. The following strategic planning process factors were analyzed : Extent to which the strategic planning process is used, the level of stakeholder involvement, and superintendents and school managers perceptions about the role of strategic planning and human resources.

Edmund (1995), collected data by using a self-administered questionnaire. A total of 427 questionnaires were distributed and 293 were returned for a response rate of 68.6%. A five point scale were used to measure perception items. Chi-square analysis was used to determine if there were significant differences, based on the perceptions of school superintendents about the impact and status of the strategic-planning and human resources process in their school systems. The result of the study demonstrated significant differences in the perceptions of stakeholders when compared. Significant differences were also found in the perceptions of superintendents and school managers about the role of the strategic-planning and human resource processes.

Beuhring (1992), researched the integration of technology into educational organizations, that is the role of human resources planning and development. The main purpose of the study was to examine the relationship between human resources and the integration of micro computing wire instructional practice. A survey was designed to gather data regarding Wisconsin school district's integration of microcomputers into instruction and the extent and scope of human resources related to microcomputers. The population of this study was all public school districts in the state of

Wisconsin.

The questions addressed in the study were : To what extent have microcomputers been integrated into instructional practice. What is the nature and extent of human resources planning related to micro-computing in Wisconsin schools? what is the relation between curricula integration of microcomputers and microcomputer human resources planning? Is there a relationship between comprehensives of microcomputer integration into instruction, human resources planning and demographic variables?

According to the findings of the study, there appears to be some positive relation with five key aspects of human resource planning and certain facets of microcomputer use. Human resource planning is an important link increasing successful changes, yet it is undervalued in many settings. Knowledgeable teachers (human resources) play a key role in successful microcomputers integration.

To assess human resource needs and human resource planning, Botwinick, (1986) made a comprehensive study of the Jewish education. Over the last two decades researchers made some empirical attempts to examine the social, vocational and economic status of Jewish education. The problems which researchers experienced in this regard were however, the lacking of a conscious effort in the past, of the organized Jewish educational community to utilize this information in order to plan effectively for the future of Jewish education profession. According to Botwinick, (1986), the first order of business therefore should involve an assessment of human resource planning needs on a national level as well as the collation of quantitative and qualitative information relating to the characteristics of Jewish educational human resource planning in each community. Essentially, the assessment of human resource planning should involve extensive analyses and review of data relating to :

- Pool of available human resources
- Pre-service training and in-service training of human resources
- Sources of findings for human resource planning.

In collecting the pertinent data for human resource planning assessment, Botwinick, (1986) had to make an extensive analysis of current research and reports, and specialized studies which would provide him with information essential for effective human resource planning. Once data were collected and analyzed, then, the commission via an interagency Consor Hum of top lay and professional leadership, would develop a report of its findings and implications, as well as human resource planning recommendations resulting from its findings. The report would then be disseminated on a national level in order to obtain community-based relations to its findings, implications and human resource planning recommendations.

Botwinick, (1986) suggests that in an effort to obtain a national consensus on human resource planning recommendations, the commission should engage in local community consultations similar to those conducted in 1983 by the Jewish Welfare Board via the commission on maximizing Jewish Educational effectiveness. This would ultimately provide the commission with the necessary input and guidance in order to proceed in fulfilling its mandate- namely, to develop agenda for human resource planning.

In this study which examined the relationship between collaborative activities made available to the teacher (human resources) and administrators and the process of systematic, human resources planning change in Illinois high schools, Capasso (1993) developed a comparison between schools not so engaged, with respect to the manner in which the teacher (human resources) and administrators were involved in the human resources planned change process. A survey instrument was employed to examine the perceptions of teachers and administrators (human resources) in both "systematic" (engaged in systematic, human resources planned change) schools. The first 21 questions, likes and multiple-choice, examined the themes of collaborating, cohesiveness, and participatory decision-making in human resource planning. The final two questions were open ended and asked respondents to list the changes a school had implemented or pondered, and the opportunities for teacher involvement in change activities.

The findings of the study included the following : (1) "systematic" schools retracted higher degrees of collaboration and participators decision-making in human resources planning than "nonsystematic" schools. (2) Principals generally perceived higher degrees of collaboration,

cohesiveness, and participatory decision-making than teachers. (3) "Systematic" respondents listed a greater number of changes for improvement and more internally-initiated, structured, pervasive changes than "nonsystematic" respondents in human resources planning and change processes.

After having discussed the related research findings on planning and utilization of human resources from various sources, focus will now be on the planning and utilization of human resources in selected countries. That is the United States of America, United Kingdom, Israel (Jewish Education) South Africa and Nigeria.

2.6. HUMAN RESOURCE PLANNING AND UTILIZATION OF HUMAN RESOURCES IN SELECTED COUNTRIES.

Human resource planning and utilization in education as a process is undertaken to ensure that a school district has the right number of people, with the right skills, in the right place, and at the right time(cf. 1.1). The first step in the human resource planning process, is to assess human resource needs. One of the most pressing problems facing rural and metropolitan areas, in human resource planning, is increasing pupil enrollment(Webb et al; 1994). A hallmark of contemporary, American society is the avalanche of federal legislation and court decisions, which in turn have had a definite influence on the human resource planning and utilization of human resources in selected countries starting with the United states of America (USA) (Webb et al, 1994).In regard to the R.S.A, South African board for human resources practice was established in 1982 but restructured in 1993(South African board for personnel practice , 1993:1) This board formulated a number of objectives.

2.6.1. United States of America

Human resource planning and utilization is not a new aspect in the USA. Documentation and research reveal that human resource planning started as early as 1900. After 1900 and during much of the first half of the twentieth century, professional and human resource planning and administration began to emerge(Webb et al; 1994).

2.6.1.1. Human resource and the influence of the country superintendent prior and after 1900:

Prior to 1900 employers assumed responsibility for human resource planning and management in the business and industrial sectors only. Even in 1886, no group existed that was concerned with the practice of human resource planning and management in education. The slow development of professional leadership in education before the turn of the nineteenth century contributed to the administrative authority to select human resource planning committees in USA. Records indicate that New York appointed the first state superintendent of common schools in 1892 who contributed greatly to the emergence of human resource planning and management. Administration at the school level also developed slowly during the 1800s. In 1837, Cleveland established a board of human resource managers and mayor of Baltimore created the position of superintendent of schools.

The country superintendency had much influence on human resources planning and management activities, both before 1900 and for some time afterwards. Teaching staff in the nineteenth century, and for some years after, were marginally prepared for their tasks. Many elementary school teachers had only a high school education, with no formal teacher training. Although the 2 years normal school teacher prominence by 1870, much of the teacher training was accomplished through other means. The country institute became a landmark for in-service training for teachers and flourished for many years, as Bloos' report states that : “ it is believed that while the country institute has done much to raise the educational standards and human resource planning and administration of the state, it has by no means reached the limit of its usefulness. The chief object of an institution was to impart a knowledge of principle and methods of teaching and school human resource planning and management. Its great aim was professional training (Currence, 1984).

2.6.1.2 Human resources in regard to effective human performance, teacher and administrators supply and demand

2.6.1.2.1. Effective human resource performance

Concern for the quality of human performance was expressed by Gibson and Hunt (1965) as follows:

“With the rising involvement in educational institutions, the number of school personnel can be expected to increase throughout and beyond the present century. At the same time, the quality of

school personnel should certainly be improved. Since the demand for professional personnel is expanding, the competition is becoming knees.... dual pressures pose problems for the maintenance of quality in school personnel" (p.38, 41)

In 1980, the concern for quality staffing in school continued when Albert Shankers, president of the American Federation to Teachers (AFT), stated before the AFT's 68th annual convention that "teachers must take control of their profession, including responsibility for removing people who should not be teaching". He further commented that "there is recognition that some are excellent, some are very good and some are terrible" (Currence, 1984)

To prove that there is a great concern for human quality and effective performance in education, when asked to identify specific problems encountered presently, school personnel directors in one state listed staff quality, security administrative personnel, and dismissing incompetent staff among the 20 leading problems facing them (Norton, 1989). Furthermore to improve human performance and quality in education, teacher and administrator supply and demand in U.S.A. must be explained.

2.6.1.2.2. Teacher and administrator, supply and demand

As indicated in (cf. 2.6.1.2.1.) authors and writers protected supply and demand data for teachers. These writers made the following forecasts :

- The United States will need 2 million new teachers in the public school system between 1990 and 1995, but historical projections indicate that only a little over 1 million will materialize.
- The expected attrition of the aging teaching force, class-size policies, and school enrollment projections will be a major factor determining the number of new teachers required to staff U.S. schools.
- The supply of newly graduated teaching candidates is expected to satisfy only about 60% of the "new hire" demand over the next 10 years.
- Most states will implement alternative routes to certification by 1995 as a solution to teacher shortages, especially in the sciences.

The U.S. Department of Education (1989) has projected the annual demand for "new hire" teachers

to the year 2000 (1989). The department data indicate that from 1994 to the year 2000, an estimated 1,357,000 new teachers will be needed. The National Centre for Education Statistics projects that the supply of new teachers will fall short of demand by approximately 40% in the year 2000. The issue of teacher supply and demand is complicated further by contentions that even in the teaching areas where teachers are more plentiful, the supply of "quality" personnel remains limited. The quality argument is presented for administrative personnel as well. The National Commission on Excellence in Education administration (Griffiths et al; 1989:36) reported that : there were 505 institutions offering courses in school administration in the United States.

Due to both the demand for teachers in many subject areas and the demands for quality human resources in the classrooms, the issue of alternative certification has gained momentum and has been implemented in various ways in the states. Wise and Darling-Hammond (1991:56) noted that alternative routes to teacher certification have spread across the country like dandelions in a suburban yard. The idea is popular at both the federal and states levels... more under the rubric, although these initiatives are as different from one another as they are from any State's "regular certification route".

Issues in the area of teacher and administrator supply and demand alternative certification programs posed critical problems for the human resources function. Further complications are revealed in such disparities as teacher shortages in some districts and reductions in force a phenomenon in others. In June 1991 lawmakers in New York approved early retirement incentives for some teachers in an effort to save jobs of other teachers who were facing layoffs. California reported a shortage of 14,000 bilingual teachers in the near future (Schmidt, 1991). Such incongruous situations add greatly to the difficulties and complexities facing personnel in human resource administration. The researchers' findings in the USA is that whilst the country is advanced in human resource planning, there are still problems to be attended to, like oversupply and shortage of teachers in some states. The next to be discussed is the United Kingdom (UK).

2.6.2. United Kingdom (U.K)

The United Kingdom (U.K) is more advanced in human resources planning and utilization. It is therefore very important to focus attention on Brewster and Tyson's (1991) proposed approach of

the utilization of human resources in educational institutions.

Human resource planning and utilization in education is well developed in the United Kingdom (U.K.). Human resources planning and utilization requires men and women of high integrity, knowledge and above all, courage to discharge their functions objectively and in U.K. such potential and talent is available (Brewster and Tyson, 1991). Planning and utilization of human resources in U.K. is focused on all levels in the education sector, that is at school level, at management level and at the decision-making level. Staffing at school is strictly related to the institutions' objectives. Discriminatory employment practices in U.K. have been eliminated. Human resources planning and the utilization of the relevant talents in schools is done in conjunction with the recognised teacher Unions in the United Kingdom (Brewster and Tyson, 1991). In the next paragraphs a proposed approach of the utilization of human resources in educational institutions is being briefly explained. In their proposed approach, Brewster and Tyson (1991), explain that any discussion of the question of how human talents and skills are utilized in an organisation or institution has to start with the observation that the majority of educationists as well as commentators on the industrial and educational scene clearly believe that there are to be an enormous wastage of individual, and educational societies are seen as depending on the execution of jobs which mainly comprise a set of narrowly defined tasks, easily learned in a short time.

Nevertheless, considering the huge variety of skills and knowledge acquired in mass full-time education and in family and community life in advanced societies, there are few who would argue that work roles typically utilize more than a fraction of the potential capacity of average employees. In a study of 275 jobs of male and non-craft workers in nine firms in Peterborough, England, Blackburn and Mann (1979:280) reported that: "87% of our workers exercise less skill at work than when they drive to work. Indeed, most of them use more mental effort and resourcefulness in getting to work than in doing their jobs".

Brewster and Tyson (1991) further explain that it is obvious that there are jobs that demand great effort and judgment to be performed well and these typically include technical, administrative and risk-taking roles as well as senior managerial positions, but the sense of a general wastage of Human resources and of the mismatch of job demands and human capacity is usually applied to a large sector of blue- and white-collar work. This judgment is the basis of the utilization problem. In

order to proceed further we need to define our terms.

“Utilization” itself implies measures both of human capacity and of the performance demanded from the individual. Human capacity is generally analyzed in terms of skills and knowledge acquired by the individual, considered as a stock available at any one point in time. “Skill” is a highly ambiguous term in that it is used to mean both a learned sequence of activities involved in performing a particular task and the recognised capacity to respond to the unexpected and the unpredictable as used by sociologists (Asanuma, 1982). After this brief discussion of the proposed approach on utilization of human resource planning, attention will be given to human resources planning and utilization in developing countries. The researchers findings is that the U.K education system is well planned. As a result it produces highly skilled workers and that utilises of human skills.

2.6.3. Developing countries

With regard to human resources planning and utilization in developing countries, little has been done thus far. Attempts are being made to revive the spirit of awareness in this regard. Attention will be focused on Israel, South Africa and Nigeria in order to register progress if any in connection with human resource planning and utilization.

2.6.3.1. Israel (Jewish education)

In his article, Botwinick, (1986), discusses a challenge to Jewish Communal leadership in regard to human resource planning for Jewish Education. He states that in order to appreciate the severity of the human resource crisis in Jewish education, one has only to count the diminishing number of students in the Jewish teacher training institution; the increasing number of full-time teachers who are confronted with the choice of either living at substandard economic levels or supplementing their income by seeking part-time jobs or assignment not related to Jewish education; the increasing number of teachers who are forced, much to their embarrassment, to obtain scholarship aid for their children’s schooling; and the staggering number of highly qualified teachers and supervisors personnel who after offering many years of dedicated work, have to leave the profession for high paying careers.

Although a spate of articles and papers have been published on these human resource planning topics, some more pragmatic than others, the shortage of qualified personnel in Jewish education continues to exist. It is escalating at a rate whereby administrative, supervisory, and teaching positions remain unfilled for the extended periods of time. To be sure, "talented young people are just not entering the profession, and effective teachers are not staying in". Botwinick, (1986), further notes that it is quite evident that without qualified personnel, the Jewish education enterprise, as would any system which depends upon human resource for service delivery, will be in danger of virtual collapse.

Recently, concerted efforts have been made on the part of local federations and several larger bureaus to seek ways of upgrading and promoting the status of the Jewish educator via placement and recruitment programs, professional staff development activities, advocacy campaigns, personnel related research, and health and welfare programs - all of which have had some impact on the profession (Botwinick, 1986). Lacking, however, in an overall planning approach to the human resources exigencies in Jewish education which would maximize the impact and effectiveness of these programs/activities and at the same time assist local communities develop the necessary planning instruments tailored specifically to their human resource needs.

Given the current status of the profession, exacerbated by limited resources, and the ever increasing demand on the Jewish Communal dollar, the Jewish community, can no longer afford to ignore the absolute necessity for coordinated and comprehensive planning in the area of human resources. It is to this end that this writer (Botwinick : 1986) proposes the establishment of a National Commission on human resources in Jewish education which will in the next decade concern itself exclusively with extensive review of the manpower needs in Jewish education, and assist local communities develop the necessary human resource planning instruments for mid-range and long range strategic planning.

After a study and discussion of the human resource planning for Jewish education, attention will be given to African Countries namely South Africa and Nigeria.

2.6.3.2. South Africa

Human resource planning and management as a functional area within the human resource planning and management sciences is relatively a new discipline in South Africa. The first professional human resource planning and management, (personnel organisation) the Boston Managers' Association was founded in 1912 (Gerber, 1985:1). The first manual on the subject human resources/personnel administration by O. Tead and H.C. Metcalf appeared in 1920. In the U.S.A. human resource planning and management was only recognised in 1946. In Germany, the university of Stuttgart began to offer human resource planning and management as a subject in 1946. The university of South Africa (UNISA) has been offering Business Economics as a subject for the Bachelor of commerce degree (Bcom) since 1955 and, among other things, this subject covers human resources planning and management. The institute of human resources/personnel management was founded in 1946 as a professional body for human resources planning managers in South Africa (Gerber et al., 1995:35).

The current situation regarding human resource planning and management in South Africa Board for human resources (personnel) practice was established on 15 October 1982, but restructured in 1993. The objective and aim of the Board was to place professional practitioners of human resources planning and management in organizations and educational institutions on a professional footing and to expand their sphere of influence in organizations and institutions (South African Board for personnel practice 1993:1). The Board further formulates its objectives as follows :

- To promote the profession of human resource practice in South Africa;
- To promote the standard of education and training of persons in human resources practice and to give recognition to the education and training; that is, the pre-requisite for registration in terms of the charter, and
- To promote liaison in the fields of education and training of human resources (Gerber et al, 1995).

With regard to teacher utilization it should be noted that according to Hofmeyer & Hall (1995), the legacy of apartheid and developing country conditions have together influenced the utilization of the teaching corps in South Africa. The following paragraphs will examine, in turn, teaching numbers, teacher utilization and major findings on teacher utilization.

Arnott & Chabane (1995) give statistics of teachers in South Africa and where they are located provincially.

- Most teachers are in KwaZulu Natal (68 356) and the Eastern Cape (58 438). Northern Province and Gauteng had about 50 000 teachers each. The Western Cape had approximately 34 000 teachers. North West, Mpumalanga and Free State had between 24 000 and 27 000 teachers each. The Northern Cape had the smallest teaching stock with just over 7 000 teachers.
- Of the 341 903 teachers nationally, 61% (209 958) were teaching at the primary level, and 39% (131 945) at secondary level.
- Of all teachers, 71% were African, 11% Coloured, 40% Indian, and the remaining 15% White.

It is clear from research that there is considerable misutilization of teachers in South Africa. Because of the rapid expansion of secondary schooling during the last two decades, many teachers who have trained for the primary level have been moved to secondary schools (Arnott & Chabane, 1995). Furthermore, many teachers have been employed to teach in the scarce subjects without the requisite qualifications. This is particularly so in the case of mathematics and science (Arnott and Chabane, 1995).

In connection with major findings on utilization Arnott and Chabane (1995) indicated that there is an uneven utilization of teachers by qualification level attained. This unevenness, it is noted and also reflected in race, gender, age and teaching experience distributions. The teaching stock is two-thirds qualified, largely African and female, and concentrated in the 25 to 45 age group. There is a direct relationship between degree of underqualification and length of teaching experience in the former African system. The longer teachers have been in the system the more likely they are to be underqualified. There seems to be little correlation between rank and qualification, with over half of all principals being underqualified (and nearly three quarter at the primary level). There is also an under-supply of secondary teachers in the subjects of mathematics and science. Proportionally, there are very few teachers in these subjects.

In 1994, 36% of African teachers teaching mathematics were underqualified in the subject. The

majority (66%) of African secondary teachers teaching mathematics had five years or less experience. The proportion of all African secondary teachers who are teaching mathematics is quite uniform across provinces and constitutes 16.5 per cent.

In 1994, 53% of African secondary teachers teaching general science were un/underqualified in the subject. The majority (73%) of African teachers teaching general science have five years or less experience. Only 10% of African teachers are teaching general science at the secondary level.

In 1994, 27% of African teachers teaching physical science were underqualified in the subject. Only 6% of African secondary teachers were teaching physical science, the majority (68%) of whom have five years or less experience.

Finally, provincially, the following trend can be noted (Arnott & Chabane, 1995).

- KwaZulu Natal, the Eastern Cape and Mpumalanga were worst-off in terms of pupil/teacher ratios, particularly in their rural schools.
- In the North West, KwaZulu Natal, the Eastern Cape, Mpumalanga and the Free State at least 40% of teachers were un(der)qualified.
- The Northern Cape, Free State and Eastern Cape had the worst qualification distributions among female teachers with nearly half of them un(der)qualified.
- The Western Cape and Gauteng had the oldest stock of teachers and North West the youngest.
- KwaZulu Natal and Mpumalanga had the least experienced teachers.
- North West and Northern Province had the worst qualification profiles among their mathematics teachers (Arnott & Chabane, 1995).

In view of the above discussion concerning human resources planning and utilization of teachers in South Africa, it should be noted that whilst this topic in education is relatively a new discipline, it is believed that by the end of the 20th Century it shall have attracted all stakeholders in education. The next aspect to focus attention on is an overview of human resource planning in secondary education in Nigeria.

2.6.3.3. Nigeria

Whilst the situation in Nigerian education set-up might have changed, attention has been focused on the position of education in Nigeria in the early and late 1970's. According to Damachi and Diejoma(1978), little was documented in regard to planning and proper utilization of human resources in Nigeria in the late 1970's.

A survey conducted for the Udoji Commission showed that as of April 1, 1973, in the public services throughout Nigeria (defined as federal and the state governments and civil services and their corporations, boards & companies) in general there was a vacancy rate of 32.90% for senior technical and professional staff 33.40% for senior managerial and administrative staff, 26.60% for intermediate technical and professional staff, and 16.24% for craftsmen and artisans (Damachi & Diejomaoh, 1978).

The major human resource planning in Nigeria include the high growth rate of population, unemployment, and underemployment and shortage of critical skills. More specifically, however, the problems of human resource planning relates to the shortage of qualified teachers, imbalance in the educational structure, an alarming rate of increase in the structure of both population and educational pyramids and lack of adequate incentives(Damachi and Diejomaoh, 1978). The neglect of the rural sector in human resource planning compounds these problems. Lack of uniform employment and promotion standards, pay scale, and fringe benefits even in the public service, have resulted in a morale problem and high resources. The low salaries for teachers has severely reduced the supply of highly motivated and qualified teachers. Human resources management planners could hardly recognize the basic fear that good quality education requires qualified teachers and therefore, a good salary (Damachi & Diejomaoh, 1978).

Regarding secondary education enrollment in Nigeria, it has increased quite rapidly since independence in 1960. Enrollment in secondary grammar schools increased from 135 364 in 1960 to 256 973 in 1970 and was expected to increase even faster. Enrollment in teacher training colleges has increased rather slowly (only about 2% per annum) - from 27 900 in 1960 to 33 400 by 1970 - and was expected to increase at a faster rate - to 234 680 - by 1980.

In spite of the relatively small growth in secondary school enrollment in the 1960's and first half of

the 1970's, it has already been stated that secondary school facilities are inadequate. The past enrollment performance in teacher training colleges has been dismal and contributed in no small way to falling educational standards. Therefore, it is essential that priority be given to the implementation of projects involving expansion of secondary schools, particularly teacher training colleges and commercial and vocational schools. It can further be shown that an inadequate supply of qualified secondary schools graduates in the sciences and technological fields constitutes a serious bottleneck to increased enrollment in institutions of higher learning(Damachi and Diejomaoh, 1978).

After giving attention to human resource planning and utilization in Nigeria, focus will now be on major challenges facing principals and teachers in planning and utilization of human resources.

2.7. Summary of the chapter

In spite of the fact that education has been given prominence in all the developing countries, both as a basic right and as one of the main prerequisites of economic development, major challenges facing school manager/principals and teachers in planning and utilization of human resources are unavoidable. Human resources (teachers) in developing countries, especially in the African continent are still lagging behind with regard to proper planning and utilization and they will have to broaden their own knowledge and abilities in this regard in order to cope with new realities. (Brewster & Tyson, 1991) It is further noted in this chapter that human resource planning and utilization of teachers in high schools is well advanced in developed countries such as the U.K and the USA.

2.8. MAJOR CHALLENGES FACING MANAGERS/PRINCIPALS AND TEACHERS IN PLANNING AND UTILIZATION OF HUMAN RESOURCES

One serious challenge facing principals and teachers is the total elimination of ethnicity, tribalism and nepotism. Secondly, the labour force/teaching staff is becoming more critical of conditions of work, living conditions and health and safety will seek improvements in training facilities, better salaries and more bargaining rights. Another major challenge facing principals and teachers in high

schools is the knowledge that they address themselves to the world of computers (Brewster & Tyson, 1991).

If the rise in teachers salaries continues to lag behind other salaries, then education will continue to get the poorest pickings of the available human resource support and this will be a serious challenge. Another challenge is that in high schools there are no uniform standards because some teachers are non-professionally qualified and this may lead to differences in the quality of their output (Rajn, 1973).

Brewster and Tyson (1991) note that human resource planning and utilization of teachers in developing countries is confronted with unique challenges arising from factors internal and external to organizations and institutions. Internal factors such as teachers and principals' professionalism, institutional climate and inter-group conflict and rivalry whilst external factors may include the nature of the society and the state of the economy. Another major challenge is the politicization of human resources functions and inefficiency of the arrangement of human resources. One of the challenges that bedevil the personnel function in Africa is the use of particularistic as opposed to universalistic criteria in making important human resource decisions. The two notions refer to different means of interpersonal control and interaction. In particularistic exchanges, interaction is governed by personal relationships of the participants, such as ethnic affiliations, while universalistic behaviour takes no account of personal relationships and concentrates instead on other aspects of the individual such as his or her formal qualifications or expertise, or ability to perform effectively in a particular job/school (Brewster & Tyson, 1991).

In most schools in Africa, the available teachers are inadequately trained, badly deployed, poorly motivated and seriously underutilized. As a result this poses a serious challenge to both the teaching profession and the educational institutions. In some cases, the bulk of the population lives in rural areas where development is lagging behind. Illiteracy (which results in great unemployment and which is a result of poor education due to unqualified teachers) also poses a serious challenge to principals and teachers (Damachi & Deijomaoh, 1978).

In the Republic of South Africa in particular, the following are serious challenges in the planning

and utilization of teachers and they need to be addressed and resolved as urgently as possible. There is an excessive demand for suitably qualified teachers whilst on the other hand there is an excessive supply of unqualified teachers. Correct placement and utilization of teachers is still a major challenge (Gerber et al, 1994). Other challenges are : the need for teacher education curricular that incorporates global perspectives and the latest advances in international knowledge, the high proportion of the budget that is allocated to teacher salaries, whilst very little funding remains for teacher development; expected increase in high schools to higher demand for high school teachers, and finally, the specialized teaching skills required for teaching multi-aged classes prevalent in rural schools is not always addressed. Teacher training needs to accommodate these specialized skill requirements (Arnott and Chabane, 1995).

CHAPTER 3

RESEARCH DESIGN

3.1. Introduction

In this chapter a description of empirical research which was undertaken to investigate planning and utilization of human resources in high schools is discussed. The information was obtained by means of questionnaires and these will be discussed, interpreted and evaluated by means of criteria formulated in the preceding chapters.

This chapter further discusses advantages and disadvantages of the questionnaire, questionnaire construction, pre-testing of the questionnaire, letter of transmittal (covering letter), the administration of the questionnaire, follow-ups, population and sampling, response rate and finally the statistical techniques, that is descriptive and quantitative data.

3.2. Instrumentation

Research methods used in both sociology and education have been investigated extensively by various authors and the use of direct contact questionnaires has its merit.

3.2.1. Questionnaires

Questionnaire is a way of getting data about people by asking them rather than by observing and sampling their behaviour. Questionnaires are used by researchers to convert the data into information directly given by a person (subject). Questionnaires can also be used to discover what experiences have taken place (biography) and what is occurring at the present (Tuckman, 1994).

3.2.1.1. Advantages of the Questionnaires

The following are the advantages of a questionnaire as a method of investigation :

- ⇒ It seeks only that information which cannot be obtained from other sources such as school reports or census data;
- ⇒ Directions for a good questionnaire are clear and complete. Important terms are defined.
- ⇒ Each question in the questionnaire deals with a single idea and is worded as simply and as clearly as possible.
- ⇒ The questions are objective, with no leading suggestions as to the responses desired.
- ⇒ Questions are presented in good psychological order, proceeding from general to more specific responses. This order helps respondents to organize their own thinking so that their answers are logical and objective.
- ⇒ It is easy to tabulate and interpret.
- ⇒ It is less time consuming than personal interviews.
- ⇒ It can be completed at a convenient time.
- ⇒ Traveling and subsistence costs are minimal.
- ⇒ Anonymity of respondents is guaranteed because their names are not given (Best & Kahn, 1993, Legotlo, 1994:196)

3.2.1.2. Disadvantages of the questionnaires

Despite the advantages of the questionnaire, it should be used with caution for the following reasons (Legotlo, 1994:163, Tuckman, 1994, Molebaoa, 1996:97).

- ⇒ It limits the kind of questions that can be asked and kinds of answers that can be obtained.
- ⇒ Personally sensitive and revealing information is difficult to obtain from a questionnaire.
- ⇒ It is difficult to get useful answers to indirect, non-specific questions from a questionnaire.

- ⇒ On questionnaires the researcher must decide all of his/her questions in advance.
- ⇒ Printing, traveling and postage become very expensive.
- ⇒ Rate of return of the questionnaires is normally very poor.
- ⇒ Impersonality may cause frustrations to some respondents.
- ⇒ Questionnaires are commonly used today and some respondents could have negative attitude towards them.
- ⇒ The questionnaire may not convey the same meaning to all respondents.

3.3. Questionnaire construction

The researcher must be very careful when constructing a questionnaire. The questionnaire must be constructed in such a way that teachers, principals and superintendents do not develop negative attitudes towards the researcher. (Borg & Gall, 1989:427). In the compilation of the questionnaire the following guidelines should be taken into consideration.

- ⇒ The questions in the questionnaire should be clear and brief.
- ⇒ Only items that relate directly to the objective of the research should be included.
- ⇒ The questionnaire should be brief and consistent but should contain all information required.
- ⇒ Questions should be simple, dealing with a single concept and be worded as clearly as possible.
- ⇒ The questionnaire should be drawn up in such a way that it will be easy to answer.
- ⇒ No repetition of what one item has already measured.
- ⇒ There should not be too many or too few items on a specific element (Molebaloa, 1996:96-97).

3.3.1. Development of questionnaire items

Each item of the questionnaire must be developed to measure a specific aspect of one of the researcher's objectives or hypotheses. The researcher must be able to explain in detail why he/she is asking the question and how the responses will be analyzed. Questions must be framed in the language that the respondents will understand, that is why it is important for the researcher to identify his/her target population before writing questions (Borg & Gall, 1989).

Questions may be of either the closed form in which the question permits only a certain response (such as a multiple-choice question) or the open form in which subjects make any response they wish in their own words (such as an essay question). It should also be noted that closed form

questions are designed so that quantification and analysis of the results may be carried out efficiently.

Also, in constructing questionnaire items, the researcher must avoid, whenever possible, questions that may in some way be psychologically threatening to the person answering, because when receiving a questionnaire containing threatening items, a person usually, does not return it.

The following are the rules for constructing questionnaire items.

- ⇒ Clarity is essential, ambiguity must be avoided;
- ⇒ Short items are preferable to long items because short items are easier to understand. Unnecessarily detailed questions must be avoided;
- ⇒ Negative items should be avoided as they are misread by many respondents, that is, the negative word is overlooked, resulting in the respondent giving an answer that is opposite to the person's real opinion.
- ⇒ Avoid "Double-barrelled" items, which require the subjects to respond to two separate ideas with a single answer. An item such as "Although Labor Unions are desirable in most fields, they have no place in teaching profession" cannot be answered with the usual closed-question format by a person who disagrees with one part of the item and agrees with the other part.
- ⇒ Technical terms, jargon, or big words that some respondents may not understand, should not be used.
- ⇒ Finally, it is very important that an effort be made to avoid biased or leading questions (Borg & Gall, 1989:430).

3.3.2. Format and content of questionnaire

Borg & Gall (1989:431), indicate that the following rules of questionnaire format and content which have been developed from experience and research should be considered carefully.

- ⇒ The questionnaire must be made attractive;
- ⇒ The lay out of the questionnaire should be such that it is as easy to complete as possible;
- ⇒ The questionnaire items and pages must be properly numbered;
- ⇒ Clear instruction must be printed in bold type;
- ⇒ The questionnaire must be organized in logical sequence.

- ⇒ When moving to a new topic, a transitional sentence must be included to help respondents switch their trains of thought.
- ⇒ Begin the questionnaire with a few interesting and non-threatening items.
- ⇒ Important items should not be put at the end of a long questionnaire.
- ⇒ Threatening or difficult questions must be put near the end of the questionnaire.
- ⇒ Words like “Questionnaire” or “Checklist” should be avoided on the researcher’s form because many are prejudiced against these words.

In this study, the questionnaire was divided into three sections, namely, section A, B & C.

Section A comprised eight questions. The purpose of these questions was to gather information about biographical, and demographical data of respondents. The respondents were requested to make a cross (X) on the relevant response.

Section B consisted of three sub themes, that is question One (1-13), question Two (2.1 -2.10).

Section C consisted of ten questions (3.1-3-10).

In section B, questions 1 & 2 comprised 23 sub-questions or items which were developed from literature study and for each item or sub question respondents were asked to indicate on a four-point scale the extent to how serious a challenge is for high school teachers and principals in the planning and utilization of human resources (1 = not a challenge, 2 = minor challenge, 3 = a challenge and 4 = a serious challenge). The purpose of this section was to determine the views of the respondents on issues in planning and utilization of human resources in high schools. Question 1 required information on planning procedures on the utilization of human resources, and the development of a more explicit of future human resources needs. Question 2 required information on issues and challenges on utilization of human resources.

Section C, comprised 10 open ended questions; and required views on teacher-principal relationship, the distribution of human talents and skills in high schools, the involvement of the department of education in the utilization of teachers in high schools and whether or not the right-sizing process will solve the problem of the imbalances experienced in high schools.

3.4. Pre-testing the questionnaire

According to Tuckman (1994), it is usually highly desirable for the researcher to try out the questionnaire on a few friends and acquaintances. When you do this personally, you may find that a number of your items are ambiguous because what may seem perfectly clear to you may be confusing to a person who does not have the frame of reference that you have gained from living with and thinking about an idea over a long period. It is also a good idea to pre-test or pilot test the instrument with a small group of ± 15 persons similar to those who will be used in the study. Borg and Gall (1989:435), recommend that the pre-test form of the questionnaire should provide space for the respondents to make comments about the questionnaire itself so that they may indicate whether some questions seem ambiguous to them, whether provisions should be made for certain responses that are not included in the questionnaire, and other points that can lead to improving the instruments.

In this study, in order to locate ambiguities and discover some defects that can be corrected before the final form was printed and sent to the respondents, pre-testing of the questionnaire was done in the following manner. A pre-test of the instrument was done with a small group of 15 people. Respondents were given seven days to return the questionnaire and after seven days thirteen people responded positively.

The following flaws were discovered:

- Incorrect numbering
- Wrong spelling
- Wrong tense
- Omission of certain important facts
- Poor wording and poor instructions

The questionnaire was then revised and corrected based on the results of the test and recommendations from the respondents (Best & Kahn, 1993).

3.4.1. Letter of transmittal (Covering letter)

The transmittal letter (covering letter) is a tool employed to introduce the questionnaire to the respondents with the main purpose of getting them to respond to the questionnaire (Legotlo,

1994:168) (See Appendix B). The letter must be brief, yet convey specific information and impressions to the subjects if the researcher is to obtain a satisfactory percentage of responses.

First, it is essential that the subjects/respondents are given good reasons for completing the questionnaire and sending it back to the researcher. A brief assurance of confidentiality should be included, it is especially important if any sensitive questions are to be asked. When highly sensitive or potentially threatening questions are included in the questionnaire, a specific description of how confidentiality will be maintained should be added. The purpose of the study should be explained briefly and in such a way as to make the subjects feel that the study is significant and important. If possible, the researcher can include a small reward or premium such as a ball-point pen with the letter of transmittal (covering letter). This reward should be given as a token of appreciation rather than as a payment for the respondent's time (Borg & Gall 1989:436-440).

3.5. The administration of the questionnaire (Data collection)

Questionnaires were self-administered in this study because this has the advantage of providing the opportunity to establish rapport's with respondents and to explain the purpose of the study. This method also has an advantage in that it results in the assembling of a number of respondents in one place (Best & Kahn, 1993).

The first step in administering the questionnaires in this study, was when the researcher approached the Rustenburg District Manager, and the seven circuit managers respectively to request permission to conduct research in all circuits and to administer the questionnaires in all high schools under its jurisdiction (See Appendix B.). Secondly, the researcher distributed questionnaires to sampled high school teachers and principals by moving from one circuit to the other. The questionnaires were collected the same way two weeks following their distribution (Van Dalen, 1979).

Self-administering of the questionnaires and direct contact with the respondents, though very expensive, it pays good dividends, and obviates the problem of being told that the questionnaire have been posted whereas they have not been. Although the response in returning the questionnaires was good, there were some respondents who didn't respond and follow-up procedures had to be

employed in retrieving such questionnaires.

3.5.1. Follow-ups

Where the time limit elapses without any positive response from some of the respondents, it is usually desirable to send a follow-up letter along with another copy of the questionnaire to individuals who have not returned theirs. A major disadvantage of the questionnaire according to (Legotlo, 1994:170) is non-response.

If the original letter of transmittal (Covering letter) fails with the non-respondent group, there is no point in sending the same letter again. Instead the researcher should change his/her approach and use a different basis for making his/her appeal for co-operation.

The follow-up letter should generally assume the tone that the researcher is sure that the individual wished to fill out the questionnaire, but perhaps because of an error on the part of the researcher, it was overlooked.

In this study, a follow-up letter accompanied by another questionnaire were personally, administered to schools where certain individuals had failed to respond positively and on follow-up visits a week later the response was very good and the general response rate of over 80% was experienced.

3.6. Population and sampling

Once the objectives or hypotheses are clearly stated, the researcher should then identify the target population from which his/her sample will be selected. The most obvious consideration involved in the selection of subjects is to get people who will be able to supply the information the researcher wants. The researcher may survey the entire group or select a sample from the population (that is random sampling). When the population is very large and no complete name list is available, it is usually necessary to use a multistage procedure to obtain a random sample (Borg & Gall, 1989:425-426).

Tuckman (1994:237) further explains that the population is the target group of the study and the first step in sampling is to define the population. Once this has been done, then the researcher must

select a sample or representative group from this population to serve as respondents. One way to ensure that this sample is representative of the larger population is to draw a random sample, because random selection limits the probability that a researcher will choose a biased sample.

In this study, a random sample of 23 high schools was chosen. From each school eight randomly selected teachers including the principal were selected. The respondents totalled 184.

3.7. Response rate

Response rate is the percentage of respondents returning the questionnaires, and quality of response depends on the completeness of data. The problem with non-response is that it introduces the possibility of bias, since the respondents might not be representative of the group intended to be surveyed (Borg & Gall, 1989).

In this study, questionnaires were personally delivered and distributed on the 8th, 9th and 10th of October 1997. After two weeks of delivery and distribution, the return rate was 62.5% (115 of questionnaires fully completed). A follow-up letter accompanied by a copy of the questionnaire to individuals who did not return their questionnaires was delivered, and after a week, the researcher once again collected the remaining questionnaires from the respondents and 45 completed questionnaires were returned, ten (10) uncompleted questionnaires were also returned and the overall response rate then amounted to 160 questionnaires.

3.8 Statistical techniques

3.8.1. Descriptive Data

A computer aided statistical analysis was employed. The SPSS programme was used to compute the results of the study (SPSS Institute Inc. 1997). The first step in the analysis was to compute the descriptive data for all sampled high school teachers and principals in the study.

3.9. Summary of the chapter

In summary, the self-administered questionnaires were employed as the main instrument in the collection of data because of the advantages mentioned in 3.2.1.1. Both descriptive and inferential statistics, with the help of statistical consultants of University of North West, were employed to

verify planning and utilization of human resources in high schools empirically.

CHAPTER 4

DATA ANALYSIS AND INTERPRETATION

4.1. Introduction

This chapter reports on the results of the empirical investigation conducted to determine planning and utilization of human resources in high schools. Views gathered through collection of data from respondents on critical items were compared and interpreted. The quantitative and qualitative data collected through the investigation are summarized and discussed in this chapter.

4.2. Review of subjects

Of the total subjects (184), 170(92.3%) respondents returned the questionnaires. Only 10 (5.4%) were returned uncompleted.

4.3. Biographical data of the respondents

Table 4.1. was drawn to illustrate the picture of the biographic characteristics of the respondents. Each variable will be discussed separately.

Table 4.1. Description of biographical data of teachers and their principals of high schools.

	F	%
1. Age in years		
below 30	40	25.0
31-35	52	32.5
36-40	26	16.3
41-45	17	10.6
46-50	16	10.0
51 & above	9	5.6
2. Sex		
male	78	48.8
female	82	51.3
3. Experience in teaching		
0-5 yrs	49	30.6
6-10 yrs	46	28.8
11-15 yrs	26	16.3
16-20 yrs	11	6.9
21-25 yrs	18	11.3
26 & above	10	6.3
4. Academic qualification		
std 10	34	21.4
std 10 + 4 courses	16	10.1
std 10 + 8 courses	11	6.9
degree	58	36.5
honours	29	18.2
masters	5	3.1
other	6	3.8
5. Professional qualification		
BAED,BPAED,BAPAED	29	18.2
Bcom Ed	1	.6
B.Sc. Ed, Bagric	9	5.7
Bcd	6	3.8
Med	2	3.8
NPL/HPTC	5	3.1

	F	%
PTC/HPTC	16	10.1
PTD(SP), UDE(PRIM)	6	3.8
PTD(JP), PTD(PP)	4	2.5
JSTC	6	3.8
SEC	2	1.3
STD/SSTC/UDE(SEC)	27	17.0
SED	3	17.0
THED(N)	13	8.2
THED(D)	5	3.1
6. Position held		
teacher	93	58.5
senior teacher	14	8.8
senior head	11	6.9
deputy principal	6	3.8
senior deputy principal	2	1.3
principal	11	6.9
other	1	.6
7. Experience of subject specialization		
below 3 yrs	34	21.5
4-8 yrs	55	34.8
9-13 yrs	37	23.4
14-18 yrs	14	8.9
19 & above	18	11.4
8. Highest qualification in subject you teach		
1st	9	5.7
2nd	24	15.1
3rd	63	39.6
4th	50	31.4
other	13	8.2

4.3.1. Age of the respondents

The subjects reported their ages by selecting one of the six age groups supplied. As Table 4.1. illustrates, more than half of the respondents, 57.5% are below the age of 35. This reaffirms the

trend noted by Arnott & Chabane (1995) that the North West Province has the youngest stock of teachers (cf. 2.6.3.2). Only nine (5,6%) is made up of teachers who are fifty one years and over.

4.3.2. Sex of respondents

From table 4.1. 51.3% (82) of the respondents are females and 48.8% (78) are males. The distribution of the male and female respondents is spread quite fairly although the female respondents are slightly higher than the male respondents (cf. 2.6.3.2).

4.3.3. Experience in teaching

With regard to experience in teaching, table 4.1. indicates that the majority of the respondents 95 (59,4%) are inexperienced. This implies that most teachers in high schools are less experienced (cf. 2.6.3.2). Only ten (6,3%) of respondents are experienced. That is 26 years and above.

4.3.4. Academic qualifications

The respondents were to report their highest academic qualifications. Table 4.1. shows that 58(36.5%) had passed junior degree, whilst 34(21.4%) of the respondents had academic qualifications of standard 10. This reveals that whilst there's a slight improvement in the number of graduates in high school (36.5%), there is still an uneven utilization of teachers by academic qualification level attained (cf. 2.1.).

4.3.5. Professional qualifications

Table 4.1. shows that 81(50.9%) of the respondents have trained as high school teachers, with these qualifications: (BAED, BPAED, BAPAED, UED, HED, STD, SSTC & UDE(SEC)); 31 (19.5%) of the respondents have trained as primary teachers but they are teaching in high schools; they hold the following qualifications: (NPL, HPTC, P.T.C., PTD (SP & SP), and UDE (primary)). An observation here is that some teachers who have trained for the primary level have been moved to high schools (cf. 2.1.).

4.3.6. Position held

The respondents reported their positions by selecting one of the eight positions given. Table 4.1. shows that 93(58.5%) of the respondents were holding the position of a teacher (a non-management

position) whilst only 2 (1.3%) of the respondents are deputy principals.

4.3.7. Experience in years of subject specialization

The purpose of this question is to find out whether teachers have specialized in subjects they are teaching. Table 4.1. shows that 92(58.2%) have been teaching for less than 13 years. In other words these teachers are less experienced (cf. 2.6.3.2). Only 14 (8,9%) of the respondents have been teaching for 19 years and above.

4.3.8. Highest qualification in subject taught

The respondents were to report their highest qualifications in subject(s) they are teaching. Table 4.1. shows that 63 (39.6%) of the respondents' highest qualifications in subject(s) they were teaching was university 3rd year level. This indicates a great improvement when comparing the 39.6% with the 21% of the African high school teachers who were underqualified in 1995 (Hofmeyer and Hall, 1995:31) (cf. 2.1).

4.4. Issues and challenges on human resource planning

The purpose of this section is to find out views of school principals and teachers on issues and challenges on human resource planning and utilization. For the purpose of this study, the frequencies of column 1 & 2 are grouped together and the frequencies of column 3 & 4 are also collapsed.

4.4.1. Planning procedures

The aim with items 1.1.-1.13 were intended to determine the views of high school principals and teachers on issues and the extent of the challenges on planning procedures and the utilization of human resources in high school.

Table 4.2. Planning procedures

	1		2		3		4	
	f	%	f	%	f	%	f	%
1. Correct placement of graduate teachers	14	9	19	12	64	40	62	39
2. Choice of curriculum of teacher trainees	8	5	14	9	55	35	80	51
3. Allocation of teaching grants to schools by the provincial ministry of education	15	9	8	5	37	23	98	62
4. Increase and or decreases in pupils enrollments	15	9	14	9	38	24	91	58
5. The ongoing mass training programmes of student teachers country wide	13	8	15	10	49	31	80	51
6. Lack of human resource planning can be detrimental to an institution	5	3	13	8	43	27	96	61
7. The implementation of right sizing process for teachers	15	10	9	6	40	25	93	59

Continuation of table 4.2

	1		2		3		4	
	f	%	f	%	f	%	f	%
8. Underqualified H.O.Ds	14	9	26	16	40	25	78	49
9. Underqualified teachers	16	10	21	13	45	29	75	48
10. Conducting teachers courses and workshops	8	5	11	7	65	41	75	47
11. High school teacher-pupil 1 to 30 need to be reviewed	6	4	17	11	42	26	94	59

keys:- 1 : not a challenge; 2 : minor challenge; 3:a challenge; 4 : serious challenge.

Item 1.1. Correct placement of graduate teachers

According to table 4.2., 79% of the respondents indicated that correct placement of graduate teachers is a challenge or a serious challenge in as far as planning and utilization of human resources is concerned. For example, in most states in U.S.A. teachers are permitted to teach only the grade level of subjects for which they are licensed; because and it is better to give teachers assignments they desire and are qualified for by virtue of academic preparation and experience (cf. 2.3.8.). Only 21% of the respondents regarded correct placement of graduate teachers as either not a challenge or just a minor challenge in S.A..

Item 1.2. Choice of curriculum of teacher trainees.

The overwhelming majority of the respondents, 86% regarded choice of curriculum of teacher trainees as a challenge or a serious challenge. 14% of the respondents felt that planning procedures in regard to the choice of curriculum of teachers was not a challenge or a minor challenge. This implies that there is a need for planners to see to it that the curriculum for teacher trainees must be

relevant to what they will be teaching the pupils in future.

Item 1.3. Allocation of teaching grants to schools by the provincial ministry of education.

Table 4.2. indicated that (85%) of the respondents regarded the allocation of teaching grants to schools by the provincial ministry of education as a challenge or a serious challenge because the ministry last allocated grants to some schools in 1994 and therefore utilization of teachers becomes a problem because of this poor planning (cf. 2.1). Only 14% of the respondents felt that the allocation of teaching grants to schools by the provincial ministry of education was not a challenge or a minor challenge.

Item 1.4. Increases and or decreases in pupil enrollment.

According to table 4.2., 82% of the respondents indicated that increases and or decreases in pupil enrollments are a challenge or a serious challenge. This indication reaffirms Rebores's (1991) belief that enrollment projections must be developed for a five-year period and that unless a school system makes an effort to predict decline or increases in the number of students to be served; it may unexpectedly experience half-filled classrooms and a surplus of teachers or overcrowded classrooms and a shortage of teachers (cf. 2.3.2.6.2.). Only 18% of the respondents regarded increases and or decreases in pupil enrollments not a challenge or a minor challenge.

Item 1.5. The ongoing mass training programmes of student teachers country wide.

Table 4.2 shows that the majority of the respondents, (82%) regard the ongoing mass training programmes of student teachers country wide as a challenge or a serious challenge in as far as planning and utilization of human resources is concerned because according to the H.S.R.C., the annual output of newly qualified teachers in South Africa is approximately 30000 (cf. 1.2). 18% of the respondents felt that the ongoing mass training programmes of student teachers country wide was not a challenge or a minor challenge.

Item 1.6. Lack of human resource planning can be detrimental to an institution (school).

An overwhelming 88% of respondents indicated that lack of human resource planning can be detrimental to an institution and therefore it is a challenge or a serious challenge (cf. 2.6.3.2). Only 11% felt that it was not a challenge or a minor challenge.

Item 1.7. The implementation of right sizing process for teachers.

84% of the respondents indicated that the implementation of right sizing process for teachers was a challenge or a serious challenge. In June 1991, when lawmakers in New York approved early retirement incentives which did not pose a serious challenge for some teachers in an effort to save the jobs of other teachers who were facing layoffs, (cf. 2.6.1.2), only 16% of the respondents regarded the implementation of right sizing process for teachers not as a challenge or a minor challenge.

Item 1.8. Underqualified H.O.D's (Academically)

74% of the respondents felt that it is a challenge or a serious challenge for the underqualified H.O.D's to be part of the management of our high schools (cf. 2.2.1.4). Only 25% felt it was not a challenge or a minor challenge for schools to have underqualified H.O.D's.

Item 1.9. Underqualified teachers (Academically & professionally)

The majority of the respondents (77%) indicated that underqualified teachers are a challenge or a serious challenge because most of them still need proper qualifications in order to cope with the challenges they are experiencing in classes (cf. 2.2.1.4). Only 23% of the respondents felt that underqualified teachers were not a challenge or a minor challenge.

Item 1.10. Conducting teachers seminars and workshops.

Table 4.2. shows that 88% of the respondents felt that conducting seminars and workshops was a challenge or a serious challenge. Only 12% felt that it was not a challenge or a minor challenge.

Item 1.11. High school teacher-pupil ratio of (1:35) need to be reviewed.

Table 4.2. shows that 85% of the respondents indicated that planning and utilization of human resources in regard to high school teacher-pupil ratio of (1:35) is a challenge or a serious challenge and needs to be reviewed. Only 15% of the respondents felt that it is not a challenge or a minor challenge.

In summary, it appears that the majority of high school principals and teachers are experiencing challenges with regard to planning procedures and the utilization of human resources as revealed by this study. Principals of schools are promoted without exposure to management and leadership training, as a result they lack expertise concerning the general planning and utilization of human resources.

Table 4.3. Utilization of Human Resources

With items 2.1-2.10, the purpose was to determine empirically challenges facing high school principals and teachers regarding the utilization of teachers (human resources) in high schools.

Table 4.3 : Utilization of Human resources

	1		2		3		4	
	f	%	f	%	f	%	f	%
1. Proper development of talent and competency	9	6	20	13	70	44	60	38
2. Recognition of individual staff differences	13	8	22	14	74	46	51	32
3. Principals serve as teachers helping other teachers to utilize their potentials	19	12	23	14	67	42	50	31
3. Identification of staff talent to facilitate an effective school programme	10	6	23	14	55	34	72	45
5. Proper job placement	12	8	21	13	62	39	65	41
6. Careful attention to teacher workload	12	8	17	11	47	30	81	52
7. Teachers offering scarce subjects like maths and science without the requisite qualifications	13	8	12	8	39	25	95	60

8. Proper and fair distribution of human resource in schools	8	5	14	9	51	32	86	54
9. The need to hire and retain well qualified and quality teachers in the teaching profession	14	9	16	9	46	29	83	52
10. The use of the talents available in educational institutions	33	21	22	22	59	38	43	27

Keys:- 1 : not a challenge; 2 : minor challenge; 3:a challenge; 4 : serious challenge

Item 2.1. Proper development of talent and competency.

Table 4. 3. shows that 82% of the respondents indicated that proper deployment of talent and competency was a challenge or a serious challenge and this type of situation can be ascribed to the fact that in most schools in Africa, teachers available are inadequately trained, badly deployed, poorly motivated and seriously underutilized, as a result this poses a serious challenge to both the teaching profession and the educational institutions (cf. 2.6.). Only 19% of the respondents felt that it was not a challenge or a minor challenge.

Item 2.2. Recognition of individual staff differences.

According to table 4.3., 78% of the respondents regarded recognition of individual staff differences as a challenge or a serious challenge whilst 19% of the respondents regarded it not a challenge or a minor challenge. It is the task of the manager of the school to recognize and know individual staff differences so that he or she can utilize such individuals correctly (cf. 2.2.1.4).

Item 2.3. Principals serve as teachers, helping other teachers to utilize their potentials.

Table 4.3 shows that 73% of the respondents felt that it was a challenge or a serious challenge for principals to serve as teachers because principals are at all times over burdened by management duties (cf. 2.3.8).Only 26% of the respondents regarded this as not a challenge or a minor challenge.

Item 2.4. Identification of staff talent to facilitate an effective school programme.

Table 4.3. shows that 79% of the respondents regarded identification of staff talent to facilitate an

effective school programme as a challenge or a serious challenge whilst 20 % of the respondents felt that identification of staff talent to facilitate an effective school programme is not a challenge or a minor challenge.

Item 2.5. Proper job placement.

The majority of the respondents (80%) regarded proper job placement as a challenge or a serious challenge. Rebore (1985), reaffirms this by noting that the placement and effective utilization of teachers is the most difficult task facing the school principal and his/her deputies (cf. 2.3.8.). Only 21% of the respondents felt that proper job placement was not a challenge or a minor challenge.

Item 2.6. Careful attention to teacher workload.

According to table 4.3., 82% of the respondents indicated that careful attention to teacher workload was a challenge or a serious challenge and this response is supported by Webb et al (1994) when he stated that staff assignment requires that careful attention be given to teacher load and that without such consideration, inequities in the workload are certain to persist and personnel who are most qualified to carry out an effective educational programme in the school often are so over burdened that their efforts are forced to a level of mediocrity (cf. 2.3.7.1.). Only 19% of the respondents felt that careful attention to teachers workload is not a challenge or a minor challenge.

Item 2.7. Teachers offering scarce subjects like mathematics and science without the requisite qualifications.

What emerges from table 4.3., is that 85% of the respondents indicated that teachers offering scarce subjects like mathematics and science without the requisite qualifications was a challenge or a serious challenge. Arnott and Chabane (1995), indicated that North West and Northern provinces had the worst qualification profiles among their mathematics teachers (cf. 2.6.3.2.). The findings on this item could be attributed to a situation in which, in recent years, educational organizations have experienced a decrease in the number of applications for mathematics and science teaching positions because of the higher wages and advancement opportunities available in private businesses and industry and this resulted in many high school teachers being employed to teach in the scarce subjects like mathematics and science without the requisite qualifications (cf. 2.1 and cf. 2.3.5.). 16% of the respondents felt that it was not a challenge or a minor challenge.

Item 2.8. Proper and fair distribution of human resources in schools.

The majority of respondents, 86% regarded proper and fair distribution of human resources in schools as a challenge or a serious challenge as it is indicated that there is considerable misutilization of teachers in South Africa. Again, because of the rapid expansion of high school education during the last two decades, many teachers who were trained for the primary level category, have been moved to high schools, hence improper and unfair distribution of human resources in high schools (cf. 2.1.). Only 14% of the respondents felt that proper and fair distribution of human resources in high schools was not a challenge or a minor challenge.

Item 2.9. The need to hire and retain well qualified and quality teachers in the teaching profession.

The majority of the respondents (81%) indicated that the need to hire and retain well qualified and quality teachers in the teaching profession was a challenge or a serious challenge. Only 19% that it was not a challenge or a minor challenge.

Item 2.10. The use of the talents available in educational institutions.

Table 4.3. shows that 65% of the respondents indicated that the use of the talents available in educational institutions was a challenge or a serious challenge as noted in 3.1. of the questionnaire. 35% of the respondents regard the use of the talents available in educational institutions not a challenge or a minor challenge.

In summary, table 4.3. shows that the overwhelming majority of high school principals and teachers are experiencing challenges or serious challenges with regard to proper utilization of human resources. It is clear that underqualification/no qualification of teachers, improper development of talent and potential are hampering proper utilization of human resources in high schools.

Another contributory factor towards the challenge facing utilization of human resources is that many principals / managers of schools were never trained as managers and leaders, as a result they find it a serious and difficult challenge when coming to proper planning and proper utilization of human resources. This is a serious challenge which needs immediate attention and remedy.

4.5. Respondents views on human resource planning.

In this section the respondents were to respond by indicating with yes or no. The purpose of this section was to get the views of high school principals and teachers on planning and utilization of human resources.

Items 3.1-3.10 consist of closed form questions. The aim of these items was to get the views of high school principals and teachers regarding planning and utilization of human resources.

Table 4.4. Respondents views on human resources planning.

	YES		NO	
	F	%	F	%
1. Are advertisement procedures properly followed in high schools	95	62	59	38
2. For effective staff utilization teachers workload is important	126	81	30	19
3. Are there indications of over or under utilization of human resources in high schools.	118	77	35	23
4. Are human resources supply match organizational needs (school needs)	81	52	75	48
5. It is necessary for teachers and principals to cooperatively plan subjects allocation	117	76	37	24
6. Is it necessary for teachers and principals to cooperatively discuss school policies during planning	123	77	36	23
7. Is the right sizing the correct solution of ensuring that the correct number of teachers as employed	77	49	81	51
8. Are human talents and skills well distributed in high schools	48	31	107	69
9. Will the voluntary severance package solve the problem of right sizing process for teachers	45	29	110	71

Item 3.1. Are advertisement procedures properly followed in high schools?

Table 4.4. shows that 62% of the respondents agreed that advertisement procedures are properly followed in high schools whilst 38% of the respondents felt that advertisement procedures are not properly followed in high schools and this can be ascribed to the fact that in almost all the developing countries, one serious challenge facing principals and teaching when coming to the advertisement procedures of teaching posts is the total elimination of the use of ethnicity, tribalism and nepotism (cf. 2.6.).

Item 3.2. For effective staff utilization teachers workload is important.

The majority of (81%) the respondents agreed that for effective staff utilization, teachers workload is important because staff assignment requires that careful attention be given to teacher workload (cf. 2.3.7.1.). Only 19% of the respondents indicated that for effective staff utilization teachers workload is not important.

Item 3.3. Are there indications of over or under utilization of human resources in high schools?

Table 4.4 shows that 77% of the majority of the respondents agreed that there are indications of under utilization of human resources in high schools. This is supported by Arnott and Chabane (1995), who says that nationally there is an oversupply of teachers if one uses the government recommended ratios; that is high schools 1:35. (cf. 2.1). 23% of the respondents felt that there were indications of over utilization of human resources in high schools.

Item 3.4. Do human resource supplies matching organizational needs (School needs?).

According to table 4.4., 52% of the respondents agreed that human resources supply do match organizational needs because staffing at school is strictly related to institutions' objectives (cf. 2.6.2.). Secondly, in regard to matching needs with supply; a final activity in human resource forecasting is to match the school district's future human resource needs with the current supply (cf. 2.3.6.). 48% of the respondents felt that the human resource supply does not match school needs.

Item 3.5. Is it necessary for teachers and principals to cooperatively plan subject allocation?

Table 4.4. shows that 76% of the respondents agreed that it is necessary for teachers and principals to cooperatively plan subjects allocation because by so doing all teachers in the school shall have been automatically involved in all planning stages of subject allocation. 24% of the respondents felt it was not necessary for teachers and principals to cooperatively plan subject allocation.

Item 3.6. Is it necessary for teachers and principals to cooperatively discuss school subject policies during planning?

The majority of respondents (77%) agreed that it is necessary for teachers and principals to cooperatively discuss school subject policies during planning. Only 23% of the respondents disagreed.

Item 3.7.

Is right sizing the correct solution of ensuring that the correct number of teachers is employed?. Table 4.4. shows that 51% of the respondents indicated that the right sizing process is not the correct solution of ensuring that the correct number of teachers is employed especially that it was open to all age groups. The U.S.A. method and approach in this regard was preferred because in June 1991, lawmakers in New York approved early retirement incentives for a particular age group of teachers in an effort to save the jobs of other teachers who were facing layoffs. This proved to be a great success (cf. 2.6.1.2.).

Item 3.8. Are human talents and skills well distributed in high schools?

69% of the respondents indicated that human talents and skills were not well distributed in high schools. This is due to the fact that from research there is considerable mis-utilization of teachers in South Africa. Because of the rapid expansion of Secondary schooling during the last two decades, many teachers who were trained for the primary level category, have been moved to secondary schools without the requisite qualifications (cf. 2.1.). 31% of the respondents agreed that human talents and skills were well distributed in high schools.

Item 3.9. Will the voluntary severance package solve the problem of right sizing process for teachers.

The majority of the respondents, (71%) indicated that the voluntary severance package will not solve the problem of right sizing for teachers because initially it was not well planned. Only 29% of the respondents agreed that the voluntary severance package will solve the problem for teachers.

Summary of the chapter

This chapter was concerned with the processing and interpretation of data collected from the questionnaires. From tables 4.1, 4.2, 4.3, and 4.4, it has been discovered that high school principals and teachers are faced with serious challenges with regard to planning procedures, utilization of teachers and the respondents views concerning planning and utilization of human resources in high schools.

In summary empirical investigation revealed that some high school teachers and principals are not well deployed. Teachers who trained for primary level are teaching in high schools. This is particularly so in the case of mathematics and science (cf. 2.6.3.2.). It is further revealed that there is over utilization of teachers in high schools and that the under lying cause is that most teachers were trained for primary level without any specialization in high school subjects, such as mathematics and physical science. It has also been revealed empirically that the department of education can remedy this situation of over and under utilization of teachers by setting relevant planning and admission procedures at the various training colleges of education. Finally it has been revealed that there is no significant difference in the perceptions of teachers and principals about their degrees of challenge for planning and utilization of human resources in high schools.

The final chapter includes findings on both the literature and empirical study, as well as aspects which need to be addressed and recommendations to be made.

SUMMARY, FINDINGS AND RECOMMENDATIONS.

5.1. Introduction

The fact that human resource planning and utilization is relatively a new topic in most developing countries especially in Africa, has become a serious challenge nationally and internationally. Little has been documented with regard to this topic and this need to be addressed by all stakeholders in education.

5.2. Summary

The statement of the problem which necessitated this research project is outlined in chapter 1. The problem question, namely planning and utilization of human resources in high schools in the Rustenburg District of the North West Province is also highlighted in this chapter.

Three aims of the research project which are discussed in the following chapters were formulated. The purpose of the study was: To determine the nature and scope of the issues and to determine from literature, strategies and models in planning and utilization of human resource.

Chapter 1 of this study serves as the orientation of the research. The statement of the problem is clearly outlined.

The aims as well as the method of research are presented.

In chapter 2 the theoretical basis of planning and utilization of human resources is discussed. Many factors that are seen as internal barriers for planning and utilization of human resources in education were discussed from a theoretical perspective.

The definitions of human resource planning and utilization are presented. The concept of human resource planning and utilization is described. What planning and utilization of human resource entail is also explained.

Various factors that are seen as internal barriers for human resource planning and utilization are discussed, like failure by managers and teachers to assess human resource needs.

The role played by schools, teachers and the education system in relation to human resources planning was also discussed.

Chapter 3 & 4 of this study deals with empirical research which includes the construction of the questionnaire based on the literature study.

Chapter 4 of this study further deals with empirical research which includes the interpretation of data which formed the main focus in this chapter. Findings and recommendations with regard to the aims of this research are discussed in the next section.

5.3. Findings

5.3.1. Findings with regard to the literature study

Aim 1. The findings with regard to research (cf. 1.4.1.) that is to determine the nature and scope of the planning and utilization of human resources in education are :

- * Human resource utilization which is the future work force need in terms of size and skills for major groupings such as educational institutions and the correct placements distribution and the best of available human resources (cf. 2.2.2).
- * The importance of human resource planning which entails humans way of projecting intentions, a most appealing and challenging endeavors because it deals with concepts of the future (cf. 2.2.2.2.).
- * The need for planning and utilization of human resources and through planning, one can anticipate and get ready for whatever the nature has in store for him and that it is indeed true that planing is significant and needed in all phases of education (cf. 2.2.1.4.).
- * Careful attention to be given to teachers workload and professional mix (cf. 2.3.7).
- * Correct placement and effective utilization of teachers (Cf. 2.3.8).

Aim 2. The findings with regard to this aim (cf. 1.4.3) that is to determine from literature strategies and models in planning and utilization of human resources are:

- * Gerber et al's human resources planning models which are explained step by step by using blocks (cf. 2.4.1).
- * Castetter's human resources planning models which are defined by making use of phrases and activities and secondly by a sequential implementation of personnel change (cf. 2.4.2).
- * Webb's human resources models which were briefly discussed under the following sub-headings human resources utilization, human resources development and human resources environment (cf. 2.3.3).

Aim 3. The findings with regard to aim 4 (cf. 1.4.4) that is to determine empirically challenges and issues planning and utilization of human resources are :

- * The empirical investigation conducted revealed that the majority of the high school teachers are young and this reaffirms the following trend noted by Arnott & Chabane (1995) that the North West Province has the youngest stock of teachers (cf. 2.6.3.2).
- The empirical investigation conducted further revealed that 81(50.9%) of the respondents have trained as primary teachers but they are teaching in high schools without the requisite qualification particularly in Mathematics and science (cf. 2.6.3.2).
- * Furthermore, the study reveals that the majority of high school principals and teachers are experiencing serious problems and challenges with regard to planning and utilization such as : enrollment predictions and the supply of human resources in schools (cf. 2.3.2 & cf. 2.3.8).
- * From the empirical study, it is revealed that unqualified teachers are hampering proper planning and utilization of human resources in high schools (cf. 2.3.9).
- * However, the study also revealed that the respondents do agree that the right sizing process was not the correct solution of ensuring that the correct number of teachers is employed especially because it is open to all age groups (cf. 2.5).

5.4. Recommendations

RECOMMENDATION 1

More attention should be given to human resource planning and utilization in schools.

MOTIVATION

Little has been done and documented in regard to human resource planning and utilization in education in third world countries especially in African Countries and there is a need that this aspect be introduced in educational institutions (cf. 2.6.3.3).

RECOMMENDATION 2

The academic and professional qualifications of high school teachers should be improved .

MOTIVATION

Biographical data revealed that there is still an uneven utilization of teachers by academic and professional qualification attained and that most teachers are still not properly qualified to teach in high schools and teachers who have trained for the primary level have been moved to high schools, therefore there is a need that teachers should undergo some academic and professional upgrading programmes.

RECOMMENDATION 3

High school principals and teachers be given management, and leadership training workshops so that their expertise in these fields must be improved.

MOTIVATION

Because teachers and principals have management and leadership roles in their various capacities as educators and managers respectively it is of great significance that they are given management and leadership training workshops to equip them with the necessary expertise.

RECOMMENDATION 4

Human talents and skills should be well distributed with regard to proper and correct utilization of human resources.

MOTIVATION

In this study the respondents indicated that human talents and skills were not well distributed in high schools and that is due to the fact that there is considerable mis-utilization of teachers in South Africa. Therefore urgent measures must be taken to remedy this anomaly (cf. 2.3.8).

5.5. Conclusion

Very little attention has been paid to human resource planning and utilization in education and without effecting urgent and immediate measures to remedy this abnormal situation, the quality of education will be diluted. Training of teachers and principals in human resource planning and utilization is a profitable investment in line with human capital theory.

In conclusion, this study has revealed that there is a need to run upgrading seminars and workshops in human resource planning and utilization. Without such seminars and workshops, principals and teachers will undoubtedly become a threat to the education of our children as well as to the social, political and economic fabric of society. From empirical investigation, it has been revealed that high school principals and teachers are not well deployed in schools. There is another revelation that there is a great overutilization of teachers in high schools and that this needs the attention of all stakeholders in education. Finally it is only the involvement of concerned stakeholders in education that can remedy the situation of proper planning and correct utilization of human resources in high schools.

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THE QUESTIONNAIRE

Questionnaire Number

			(1 - 3)
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Card No

	(4)
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SECTION A

Biographical and background information.

Kindly answer the following questions by crossing an x on the appropriate block.

1. Your age in years

Below	30	1	
	31 - 35	2	
	36 - 40	3	
	41 - 45	4	
	46 - 50	5	
	51 and above	6	(5)

2. Sex

Male	1	
Female	2	(6)

3. Experience in the teaching field

0	-	5yrs	1	
6	-	10yrs	2	
11	-	15yrs	3	
16	-	20yrs	4	
21	-	25yrs	5	
26	-	and above	6	(7)

4. Highest academic qualification (choose only one answer)

Below Std 10	1	
Std 10	2	
Std 10 plus 4 degree courses	3	
Std 10 plus 8 degree courses	4	
A degree e.g. B.A. (first degree)	5	
Honours degree or B.ED.	6	
Masters degree	7	
Doctorate	8	
Others (specify)	9	(8)

5. Highest professional qualification (choose only one answer)

Professional		Professional	
Degree		Diploma and certificate	
BAED	1	NPL/H.P.T.C.	8
BPAED			
BAPaed		P.T.C./H.P.T.C.	9
Bcom (Ed)	2	PEC/PCE/SPTC	10
		PTD (SP) UDE (Prim)	11
B.Sc. (Ed) Bagric	3	P.TD (J.P) PTD (PP)	12
(Ed)		J.S.T.C.	13
Bprim Ed	4	SEC	14
		STD/SSTC/UDE (SEC)	
		3Y/3J	15
B.Ed	5	SED (3Y/3)	16
		THED (n) HDE (4y/4j)	17
M.Ed	6	THED (d) (1y/1j)	18
DeD	7	UED/HED(p) (1y/1j)	19

(9)

6. Position held

Teacher	1	
Senior Teacher		2
H.O.D.	3	
Senior H.O.D.	4	
Deputy Principal	5	
Senior Deputy Principal	6	
Principal	7	
Others (specify)	8	

(10)

7. Experience (in years) of subjects you are teaching

Below 3yrs	1	
4 - 8yrs	2	
9 - 13yrs	3	
14- 18yrs	4	
19 and above	5	

(11)

8. Indicate your highest University/College qualification in the subject(s) you are teaching

1st year	1	
2nd year	2	
3rd year	3	
4th year	4	
Others (Specify)	5	

(12)

SECTION B

Views of school principals and teachers on issues and challenges on human resource planning and utilization in schools.

Please indicate how serious a challenge each of the following is for schools or school Principals in the planning and utilization of human resources by ticking on the appropriate number.

Key

1. Not a challenge
2. Minor challenge
3. A challenge
4. Serious challenge

1. Planning procedure in regard to human resources

1.1. The intake of teacher trainees.
(13)

1.2. Correct Placement of graduate teachers.

1.3. Choice of curriculum of teacher trainees.

1.4. Allocation of teaching grants to schools by the provincial ministry of education.

1.5. Increases and or decreases in pupil enrollments.

1.6. The ongoing mass training programmes of student teachers country wide.

1.7. Lack of human resource

				(13)
				(14)
				(15)
				(16)
				(17)
				(18)

- human resources in schools (33)
- 2.9. The need to hire and retain well qualified and quality teachers in the teaching profession. (34)
- 2.10. The use of the talents available in educational institutions. (35)

SECTION C

- 3.
- 3.1. Are advertisement procedures properly followed in high schools (36)
- 3.2. For effective staff utilization teachers workload is important (37)
- 3.3. Are there indications of over or under utilization of human resources, in high schools? (38)
- 3.4. Can the department of education remedy the above situation (4.3.) (39)
- 3.5. Are human resources supply match organizational needs (school needs) (40)
- 3.6. Is it necessary for teachers and principals to cooperatively plan subject allocation? (41)
- 3.7. Is it necessary for teachers and principals to cooperatively discuss school subject (42)

Yes	No
1	2

Yes	No
1	2

	Yes	No
1	2	

Yes	No
1	2

Yes	No
1	2

Yes	No
1	2

Yes	No
1	2

policies during planning?

- 3.8. Is the right sizing the correct solution ensuring that the correct number of teachers are employed.

Yes	No
1	2

(43)

- 3.9. Are human talents and skills well distributed in high schools?

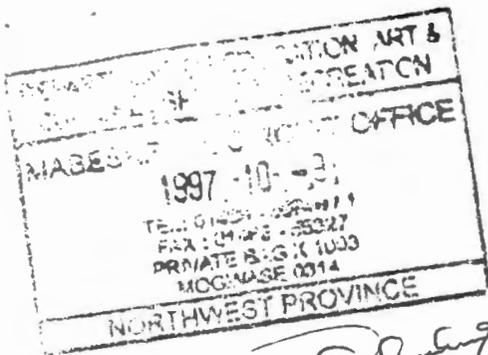
Yes	No
1	2

(44)

- 3.10. Will the voluntary severance package solve the problem of right sizing process for teachers.

Yes	No
1	2

(45)



[Handwritten signature]
CIRCUIT MANAGER

Private Bag X2046 MMABATHO 2735
Republic of South Africa
Telephone : (0140) 892111
Fax No. : (0140) 25775

Date

Your reference

Our reference

The Principal/Circuit/District Manager
Private Bag X82110
RUSTENBURG
0300

REQUEST FOR PERMISSION TO CONDUCT RESEARCH

Our postgraduate students (M Ed. & B Ed) are conducting research in education.

You are hereby kindly requested to allow Mr. M. J. Pitse to conduct research in the school, circuit, district under your jurisdiction.

* The topic is: Planning and utilization of Human resources in High Schools in the Rustenburg District of the North West Province.

The findings of this research will be made available to you at your request. Furthermore all data collected from schools will be kept confidential, and no identification of a specific school will be given when the report is completed.

Thanking you in anticipation

Yours sincerely

[Handwritten signature of Dr. M. W. Legotlo]

Dr M. W. Legotlo

HEAD: EDUCATIONAL PLANNING & ADMINISTRATION.

* N.B: In this study, Human resources refer to manpower, labour force or teachers well and appropriately trained and skilled to teach in educational institutions: (High School Teachers in particular):

Approval must also be obtained from the District Office. 27/10/07.

Approved on behalf of the District Office. [Signature] 2/10/07.