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Professional judgment in and for complex social and educational contexts

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Abstract

Promoting equitable access to social and educational resources often relies on the reasoned actions of professionals working in complex contexts. The notion of *professional* is contested. It is taken here to refer to people whose expertise comprises theoretical knowledge that informs judgment and action in complex, practical situations. Teachers and social workers are the focus of this article and we bring together notions of their professionalism and complexity. Complexity is associated with the interaction of several variables that make for unpredictability and uncertainty. We argue that the professional can be seen as a nested system within a complex context and that professional knowledge and identity are imbricated with context. In making professional judgments, professionals have influence in complex contexts. This points to the importance of professional preparation and learning, professional collaboration, and ethical decision making. Complexity is also a reminder of the limits of professional practice, given the influence of other systems and the unpredictable and uncertain nature of complex contexts. We suggest that the idea of *complex professionalism* should be developed to understand professionals as complex systems themselves who act, interact, learn and evolve – not just in relation to their environments, but also to each other.

Keywords: professionals, professional judgment, complexity, complex contexts, social justice

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Introduction

Professionals practise in increasingly complex contexts. This complexity arises from the sociopolitical, physical, policy, technological and economic environment, and human identity/ies, behaviour and interactions. The very nature of professionalism assumes the ability to draw on a range of propositions and abstract knowledge and apply these to solve real world, contingent and unpredictable problems. This special issue brings together the ideas of professional judgment and complex contexts with a focus on social and educational practice. In this article that frames the special issue, we first critically explore the notions of the professional, professional learning and professional judgment. We then give an account of complexity and identify key concepts that have been taken up in social and educational research. We draw on evidence from the articles gathered in this special issue to support our contention that promoting equitable access to social and educational resources relies on the reasoned actions of professionals.

Professions, professionals and professional learning

Professions are popularly understood as those occupations that require highly specialised training in preparation for some form of public service. Doctors, lawyers and engineers are archetypal professionals. Beyond the popular imagination, the notion of 'professional' is debated, with scholars seeking to capture exactly what constitutes a profession, a professional, professionalisation and professional judgment. It is beyond the scope of this article to engage in these debates but it is useful to emphasise the key elements of abstract and theoretical knowledge, which inform judgment and action in complex, practical situations (Abbott 1988; Winch 2014). Some writers see professions as operating at the confluence of the 'sacred' and the 'profane' (Grace 2014; McNamara & Fealy 2014). The sacred, defined by McNamara and Fealy (2014: 158-159), is 'the world of conceptual relations, comprising the collective representations of a community that have accumulated over time, and which can be manipulated, codified and systematised in the mind.' The profane, they say, 'is the mundane sphere of practical and direct wisdom, where meaning arises out of direct bodily engagement.' Professional knowledge is bidirectional, facing the knowledge of the disciplines and the field of practice (Young & Muller 2014).

Autonomy is usually regarded as an element of a profession[1] (Hargreaves & Fullan 2012; Grace 2014), making teaching, nursing and social work contested as professions. These are sometimes called 'semi' or 'low-level' professions. Teachers, says Grace (2014: 23), were previously regarded as professionals but 'are now being reconstructed as agents to service the economic needs of the competitive state.' Carrim (this issue) comments on the lack of professional autonomy experienced by South African teachers when teaching the fast-paced, content-rich national curriculum (the Curriculum and Assessment Policy Statements, or CAPS). This is borne out by

[1] We acknowledge that other professions do not operate with full autonomy, and concur with Grace (2014) that state control and the force of the market threaten autonomy across all professions

research showing teachers feel they cannot provide the academic support their learners need because of the demands of this curriculum (Geldenhuys & Wevers 2013; Andrews, Walton & Osman 2019). While these low-level professions might not meet the criterion of autonomy, they uphold many of the expectations of professionals.

Professionals are expected to act according to an ethical code of conduct with, what Hargreaves and Fullan (2012: 80) call, 'an ethic of service, even a sense of calling, in relation to clients.' Grace (2014: 24-25) shows the challenge that 'market culture' in the 'education, health and social welfare systems' poses to the moral and ethical practices of professionals, and how these 'test … occupational integrity.' In response to this challenge, he argues for 'a humane and inclusive education' in professional formation, and not 'merely a process of narrow technical training' (ibid.: 24-25). Notwithstanding these challenges, the moral and ethical dimension of professional practice is affirmed as being integral to an understanding of professions and professionals (Higgs-Kleyn & Kapelianis 1999). Professions have statutory organisations to describe and regulate the behaviour of its member professionals and so, uphold the expectations of ethical conduct.

The ethical demands of teaching as a profession are affirmed by Msibi (this volume). He explains that, despite the existence of the South African Council of Educators, which prescribes the ethical conduct of professional teachers, unethical behaviour is evident in some South African schools. He cites literature that shows physical and sexual abuse of learners, teachers not meeting teaching obligations, and a culture of impunity. Msibi's article explores what he calls 'hyper-professionalism' enacted by teachers whose sexual identities are marginalised. They discover that high levels of professional performance are not rewarded, but that recognition and promotion only come through alignment with unprofessional behaviours that dominate in dysfunctional schools. These constraints on professionalism are located in South Africa's apartheid legacy, with the author pointing to habituated practices that find their origin in 'a history of pain, inequality and general social dysfunction.' This article, which asks important questions in its conclusion about the extent to which policy imperatives can be expected to undo centuries of 'woundedness,' points to the futility of understanding professional practice apart from contextual exigencies.

Professional knowledge and identity are imbricated with context, and context is more than the site for the exercise of professional expertise. So argues Carrim (this issue) in an article that confronts abstract, ahistorical and decontextualised notions of professional knowledge, professionalism and professional practice. In so doing, Carrim contributes to the body of literature that critiques traditional notions of the professional and professional learning. This literature includes work that exposes the gendered, racialised and class biases in the evolution of the professions that arise from a number of factors. These factors include the gatekeeping power of professional bodies, boundary work that 'fosters the exclusion of rivals' (Hall 2005: 189), and a lack of access to higher education by marginalised groups such as disabled people (see Ndlovu & Walton 2016). Others scholars have drawn attention to the hegemony of the Western, colonial nature of professional knowledge

in some fields (Titchkosky & Aubrecht 2015), to the contribution of professionals to the maintenance of inequitable societies (Pillay & Kathard 2015), and to the wealth, status and power that sets professionals apart from others (Ndlovu 2016).

Teachers are more than their professional identity, argues Carrim (this issue). He challenges a reductionist view that defines teacher professional identity in terms of a set of acquired knowledge and skills that others do not have. While he acknowledges this expertise as a necessary condition of professionalism, he argues that this is not a sufficient condition. Teachers (and by extension, other professionals) carry within them multiple identities – racial, classed, religious, sexual and ability and these shape both 'their professional practices and their senses of self.' Furthermore, Carrim argues that 'where, when and with whom professionals are expected to provide their services profoundly influence their professional practices.' As an example, Carrim focuses on teachers' own sense of normality and ability as having a profound impact on the assumptions made about children with disabilities in their classes, and whether teachers will uphold the human rights of their learners without discrimination based on ability. Like other articles in this special issue (see Wilson and Nel, Batchelor and Petersen, Engelbrecht and Muthukrishna, for example), Carrim's argument forces issues of professionalism into relationship with concerns for social justice and equity. In doing so, he urges us to confront the colonial foundations of teacher education and to be critical of dominant Western, European definitions of who professionals are and what they do.

Context is clearly an important determinant in the development of professional teacher identity. Wilson and Nel's report (in this issue) on a comparative study into the development of professional identities among preservice teachers adds empirical weight to Carrim's argument. Drawing on positioning theory, Wilson and Nel show the impact of field experience placement on preservice teachers in England and South Africa. Whereas teachers in both contexts had similar views on what constitutes a 'good teacher,' they were quite different in how they adopted or resisted the institutional teacher identities they encountered during their placements. The English students embraced the expectations of their schools, particularly as these related to performance targets as an essential part of their professional identity. The South African preservice teachers were more critical of the practices of their supervising teachers and distanced themselves from the teacher behaviours they observed, forming what are described as 'oppositional' identities. In this, we see echoes of Msibi's teachers who struggled to assert resistant professional identities. Wilson and Nel see implications of their findings for teacher education, showing that different approaches to preservice teacher education in the different countries also has an impact on the emergence and development of professional identity. They acknowledge the complex interplay of factors operating in these contexts and, like Carrim, conclude their article with a call for a reexamination of professional preparation.

Learning for the professions demands curricula that recontextualise both theoretical (disciplinary or sacred) and practical (profane) knowledge (Shay 2013). Shay (2013: 575) describes the logic of professional curricula as 'the demands of the practice' with the 'principles informing the practice

… [being] derived from theory.' How this should be enacted is a matter of debate in professional preparation, from the introduction of the problem-based learning that has displaced discipline-based learning in medicine and engineering (Shay 2013), to questions of how the practicum should articulate with coursework in teacher education (Walton & Rusznyak 2018). Attempts have been made to disrupt the theory/practice binary that is often invoked in professional preparation, to focus on cumulative and integrated knowledge building that moves between context-specific knowledge and abstract, theoretical knowledge (see Maton 2014). Winch (2014: 58) argues for the professional curriculum to provide opportunities for making and reflecting on judgments 'in conditions of increasing complexity.' Batchelor and Petersen (this issue) attest to the complexity of professional work, with their focus on preservice teacher education. Their initial literature review draws together a range of ideas that have been found to be useful in understanding teacher judgment in practice, leading them to their focus on artificial intelligence and robots in education.

Technological change has a significant impact on professional practice and, by extension, on professional learning. Changes to the knowledge base of professionals, and to the expectations of the society they serve originate, says Schon (2008), in technological change. The professions, he argues, 'must bear the brunt of responsibility for generating and managing this change' (ibid. 2008: 25). The complex possibilities and limitations of artificial intelligence and robots in education are explored in Batchelor and Petersen's study, reported in this issue. Preservice teachers contributed their views about the future of teaching if robots could do the work of teachers. The data shows some limitation in understanding the breadth of possibility that artificial intelligence offers, which the authors attribute to preservice teachers' prior experiences of schooling and weak views of artificial intelligence. The preservice teachers do acknowledge the potential advantage that robots might have in terms of content knowledge, indicating, to the authors, implicit critique of human teachers. This critique arises from preservice teachers' experience of their own schooling and of their practicum placement – a theme that also emerges in Wilson and Nel's article. Robot teachers are seen to offer some solutions to the challenges of postapartheid classrooms, including rapid curriculum change, language teaching in a multilingual society, teacher bias and discrimination, the fast-paced CAPS curriculum which forecloses the possibility of individual support (cf Carrim, and Wilson and Nel, in this issue), and assessment. All these challenges point to the complexity of South African classrooms. But what the authors foreground, is the way that this exercise revealed preservice teachers' nuanced understanding of the complexity of teaching. In particular, they were adamant that robots could not match the social and emotional learning that a human teacher could facilitate, nor could they serve as role models and offer educational care. The authors conclude by reiterating the importance of a professional knowledge base acquired through systematic study to meet the complex demands of teaching.

Professional judgment, as opposed to ordinary judgment, is derived from theoretical knowledge (Shalem 2014). Professional expertise operates as professionals draw on this theoretical knowledge to inform their judgments and action in practice (Winch 2014). Professionals must thus have access to 'a reservoir of deductive propositions' and 'disciplinary-based knowledge of

procedure' (Shalem & Slonimsky 2013: 80), which inform the judgments, decisions and choices made in specific contexts. Professional judgment is explored in various articles in this special issue. Walton and Pretorius, for example, point to the 'life-changing' implications of decisions made by social workers in mental health care, and point to the theoretical foundations of social work practice. Engelbrecht and Muthukrishna identify changes in the professional judgment of teachers in a school as they engage with the demands of inclusive education, noting the importance of reflexive collective inquiry in developing professional judgment.

Walton and Rusznyak find professional judgment at work in a team tasked with developing standards for professional teaching in the area of inclusive education. In their article, the authors identify a number of dilemmas that the team encountered in carrying out the task. These dilemmas were conceptual and practical, and reflected the complexity of the task and of the context for which the standards were intended. Professional judgment is shown to be operating given that members of the team had to find consensus through the dilemmas. In this case, the exercise of professional judgment required an understanding of the breadth, depth and boundaries of participants' fields of expertise as well as consideration and appreciation, through dialogue, of different positions. From these and other examples, it is clear that professional judgments made in educational and social contexts must consider the complexity engendered in and by the interaction of diverse people and their environments.

Complexity

It is easy to confuse 'complicated' with 'complex.' If something is complicated, it might be difficult to understand – but it is ultimately logical, can be reduced to component parts, and is predictable and coherent. Complexity, by contrast, is associated with the interaction of several variables that make for unpredictability and uncertainty. This interaction is not linear, resulting in contexts characterised by branched and networked relationships among constituent factors (Clarke & Collins 2007). Complex contexts evolve as nested systems, comprising systems within systems. Reciprocal influences between and within these systems mean that learning and change in one particular system results in change in others (Engeström 2000; Stollar et al. 2006; Opfer & Pedder 2011). Schools are examples of complex systems constituted by 'a web of social relations, interactions and micropolitics, in addition to external requirements, pressures and expectations' which cannot be understood in isolation (Harris et al. 2018: 84). Together with other institutions and social structures, schools exemplify 'aggregate complexity,' a type of complexity that 'attempts to access the holism and synergy resulting from the interaction of system components' (Manson 2001: 409).

There are, according to Manson (2001: 409) four key attributes of aggregated complexity, which we describe briefly, showing how these have been taken up by authors in this volume. First, the relationships between entities define a complex system. Second, the web of relationships comprises an internal structure of systems and subsystems, with any single entity potentially belonging to a number of subsystems. The complex system inevitably has a reciprocal relationship

with the external environment. Learning and emergent behaviour is the third attribute of complex systems, and refers to the fact that the complex system 'actively shapes, reacts and anticipates' (ibid.: 410) in response to the environment. Emergence refers to the 'unexpected and apparently random subsequent properties and behaviours' (Mason 2008: 32) that emerge in a particular environment, given sufficient complexity. Finally, complex systems are characterised by change and evolution (Manson 2001). This means that complex systems can be described as adaptive because they self-organise and innovate.

The potential of complexity theory has been realised in social and educational research, particularly where the imperatives of social justice demand change particular contexts. Ansell and Geyer (2017) maintain that complexity thinking is based on a vision or belief in the ability of well-intentioned people and societies to make progress in a positive direction by engaging in discussion, learning and collaborative interactions. As such, it has transformative potential and complexity theory can be a valuable tool in the quest for social and educational justice.

The usefulness of complexity science for education research is well illustrated by Engelbrecht and Muthukrishna in their article in this issue. The school they studied faced the challenge of embracing inclusive education, in line with South Africa's education policy. The authors make a case for understanding the school as a complex adaptive system, and they identify how collective leadership has enabled the development of a learning organisation, able to adapt to the changing demands of the education environment. Change is also enabled by networking structures both within the school and with community partners. This enables the school to respond to challenges in contextually relevant ways. The authors provide a useful concluding summary of their findings about adaptive leadership and actors in a complex system. These points will be of interest to those seeking to strengthen inclusivity in the complex realities of South African schools.

Governance is the concept that Tchombe (this issue) sees as bringing together the ideas of the complexity of the classroom and the expectations of teachers as professionals. This is congruent with other research that that elaborates the problem-solving capacity of governance systems when faced with dynamic and unpredictable changes (Pierre & Peters 2005; Duit & Galaz 2008). Tchombe describes a role for governance that focuses on the structures and processes designed to ensure accountability and transparency in the complex classroom space. She argues that governance in education can regulate and coordinate actions through management directives that promote accountability. Enabling governance practices in schools is seen by Tchombe as constituting an empowering mechanism that will be beneficial to all pupils, allowing them to find space for full participation in an inclusive education system. The article suggests that the professional preparation of teachers includes courses on the role of governance in schools to equip teachers with the problem-solving skills they will need in the complex and unpredictable classroom environment.

Complexity thinking inevitably leads to an acknowledgment of transdisciplinarity. Not only is complexity theory used across a range of disciplines, complex social and educational contexts with their nested and networked systems are likely to represent more than one field of professional

practice. As a result, transdisciplinary thinking and practice is demanded of professionals in complex contexts. While we may read transdisciplinarity into the articles in this issue by Petersen and Bachelor, and Engelbrecht and Muthukrishna, the article by Walton and Pretorius explicitly engages with the complex relationships that exist in transdisciplinary or inter-disciplinary teams that are involved in mental health care. The authors start from the premise that mental illness is itself multidimensional, and context introduces compounding and complexifying factors in mental health care. As a result, a multidisciplinary team is required for effective diagnosis and treatment of mental healthcare users. This article argues for the particular contribution that social workers make in this multidisciplinary team. Like teachers, social workers may have their professional status questioned, but Walton and Pretorius make a compelling argument for the value and basis of the social worker's professional judgment in this context. In particular, the authors note the role of social workers in primary, secondary and tertiary prevention efforts in mental health care; assessment and interventions when patients are admitted to psychiatric hospitals; and discharge planning and post-discharge care. The conclusion to the article contains valuable suggestions for the professional preparation of social workers.

Professionalism as and in complexity

Complexity offers a way to understand the work of professionals in challenging contexts like education and healthcare. Instead of viewing the professional as an external agent who applies a judgment in a unidirectional and linear manner into a context, the professional can be seen as a nested system within a complex context. This acknowledges that professionals themselves are subsystems of a number of contexts (cf Carrim, this issue), and that they comprise a subsystem of the context in which they practise. This means that professional learning can occur as professionals interact with each other and with local actors and that professional judgment is shaped by, and in turn shapes the context in which it is made. These considerations of professionalism as and in complexity, result in a paradox. On one hand, professionals and their judgments have the potential to bring about change at various levels in the systems where they practise. The impact of what they do potentially reverberates through the systems with which they interact. This places huge responsibility on professionals to ensure that they have a rigorous and extensive knowledge base and to act ethically in the best interests of the people they serve. All of the articles in this special issue make reference to the influence of professionals, and variously point to the importance of professional preparation and learning, professional collaboration, and ethical decision making. But, on the other hand, complexity is also a reminder of the limits of professional practice, given the influence of other systems and the unpredictable and uncertain nature of complex contexts. Here, too, articles in this special issue make reference to the impact of external social, economic and historical systems on contexts, and the professionals working within them.

Conclusion: The social justice imperative of professional judgment in complex contexts

The social and educational contexts described in most of the articles in this special issue are complexified by legacies and current practices of discrimination and inequality, as well as resource constraints. Professionals practising in these contexts are expected to use their expertise to promote equity and redress, and play a role in transformation. This is no easy task, and many of the articles in this special issue point to ethical challenges to professional practice that are engendered by structural conditions beyond the immediate control of the professionals themselves. We are convinced by the weight of argument of the articles in this special issue of three aspects of professional judgment to promote social justice in complex contexts:

- Learning for the professions requires systematic study and the acquisition of a theoretical knowledge base to inform judgment in practice. We agree with Shalem (2014) that experiential knowledge is insufficient for professional judgment and see the potential for further deprofessionalisation in the education and social services sector if practitioners are not prepared for their professions with a high level of abstract, conceptually rich knowledge that is context sensitive. Failure to require this of professionals will most affect those who are vulnerable to marginalisation in social and educational contexts, and further perpetuate inequality.
- Professionals, and those who prepare professionals, also need a nuanced understanding of the complexity of the contexts in which they practise. This means appreciating that professional judgments will be made in contexts where several variables interact, making for unpredictability and uncertainty, and where the relationships among constituent factors are branched and networked (Clarke & Collins 2007). In cases of social and educational deprivation, it is especially incumbent on professionals to understand the complex lives, histories and conditions of those they serve. Professionals also need to see themselves as constituting a system within complex contexts, and understand that they both shape and are shaped by these contexts.
- Any discussion of the components of professionalism illustrates the complexity of the notion of the profession/al and professional judgment in practice. This is illustrated across all the articles in this special issue, from Carrim who challenges simplistic and ahistorical constructions of the professional, to Msibi who shows that acting professionally is fraught and contested, to Walton and Pretorius who describe the multifaceted roles of professionals. We see value in developing the idea of 'complex professionalism' to understand how professionals as complex systems themselves, act, interact, learn and evolve – not just in relation to their environments but also to each other.

The different perspectives offered by the authors of the articles in this special issue serve to illustrate the very complexity of the challenges facing social and educational professionals in the 21st century. There are a range of theoretical perspectives and epistemological commitments represented and, together, the articles do not present a consistent or unified view on the topics that

are woven throughout the special issue. Our intention in this introductory article is not to direct the reader to the divergence and debate, but to affirm the value of considering what it might mean to make professional judgments in complex contexts, and what is required to prepare those who will practise in these contexts.

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Pushed out! The perils of teacher professionalism in dysfunctional South African teaching contexts

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Abstract

Teaching practice by its very nature is complex. However, in contexts riddled with a history of apartheid and dysfunctionality, there are added layers of complexity – especially for teachers seeking to enact professionalism. Drawing from a wider study on the construction of sexual and professional identities by African male teachers who engage in same-sex relations, this paper showcases various ways in which contexts of school dysfunctionality impact on teachers who seek to enact professionalism. I argue that the eight teachers who participated in the study resorted to emphasised forms of professionalism (what I term, hyper-professionalism) because of their marginalised sexualities. This form of professional practice took attention away from their identities and directed it to their competencies as teachers. However, the result was often negative responses from peers and managers – particularly in contexts of school dysfunction. Using sociocultural theory, in particular Bourdieu's (1977) concept of habitus, the paper shows that the teachers were pushed out of their schools because of their acts of professionalism. The paper calls for a more nuanced approach in understanding school dysfunctionality – an approach that appreciates the debilitating effect of history in shaping present-day practices in South African schools.

Keywords: teacher professionalism, dysfunctional schools, teaching, violence, school culture

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Introduction

The majority of South African schools are in crisis (Fleisch 2008). Literature on schooling in South Africa paints a picture of general dysfunction (Letseka 2013). A key feature of this dysfunctionality has been a complete breakdown in the culture of teaching and learning (Christie 1998), resultant from a multitude of factors including teacher unprofessionalism (Msila 2014), contested power relations between teachers and principals in schools (Fleisch & Christie 2004) and a lack of teacher accountability (Chisholm et al. 2005). Central to this normative condition of dysfunctionality is violence. This violence circulates between teachers and students, students and students, teachers and managers as well as teachers and parents. For instance, recently, a learner in the North West province was given a 10-year imprisonment sentence for stabbing his teacher to death (Gous 2019). A teacher was also badly assaulted by a parent, allegedly for ill-treating her son (Seleka 2019). These problems extend beyond historically African schools, spaces that have largely been presented in literature as dysfunctional, and include former Model C and private schools – for instance, some teachers in those schools have been accused of being unprofessional due to demonstrated acts of racism, violence and sexual abuse (Germaner 2018).

This paper draws from a wider life history study on the construction of sexual and professional identities by African male teachers in rural and township contexts of the KwaZulu-Natal province of South Africa, and who engage in same-sex relations (Msibi 2018) – and it showcases the various ways in which contexts of school dysfunctionality impact on teachers who seek to enact professionalism. While school dysfunction, particularly the loss of a culture of teaching and learning in South African schools, has been widely covered in literature (Chisholm et al. 2005; Weeks 2012; Msila 2014), very little has been done to unpack the various ways that teachers who exhibit professionalism navigate teaching spaces that are deeply rooted in dysfunctionality. This paper seeks to do this by focusing on eight male teachers who adopt hyper-professionalism in executing their duties. This is a form of professional conduct that operates by compartmentalising identities, clearly separating public acts from private ones. Chiefly, such professional conduct focuses on clinical promotion of excellence and competence in the classroom, and the relegation of matters deemed personal to the private space. The paper argues that professional teachers in dysfunctional contexts are often sidelined and pushed out of their schools. This is largely because these teachers are often perceived as threats by incompetent managers and peers. The paper argues that this push results from embedded cultural norms of dysfunctionality that are sustained, maintained, reproduced and normalised in such schools. I begin with an exploration of literature on school dysfunctionality in South Africa. This is followed by a brief section on teacher professionalism that seeks to present a localised account of teacher professionalism. Another brief discussion of the theoretical framework informing the paper follows, after which, a discussion on methodology. I then present findings of the study, with the discussion integrated within the findings. A conclusion points to the way forward.

It is important to put forward a disclaimer on the discussions presented in this paper. As noted above, the paper draws from a wider study focusing on the various ways in which teachers who

engage in same-sex relations construct and negotiate their sexual and professional identities in rural and township contexts of KwaZulu-Natal. The wider study had, as its focus, an analysis of the various ways in which the teachers' same-sex-loving identities found meaning and expression in schools and communities. A book (Msibi 2018) and article (Msibi 2019) were dedicated to an in-depth exploration of the teachers' same-sex-loving identities and their impact on professional practice. This paper does not focus on the teachers' identities and their impact on their professional conduct. The focus, rather, is on their enactments of professionalism, something that was found to be foregrounded by the teachers in their schools more than their sexualities. Nonetheless, some of the data presented will make reference to the teachers' sexualities given that the need to shift attention away from their same-sex-loving identities is what led them to adopt the forms of professional practice discussed in the paper. It would, however, be dangerous to reduce the type of experiences that the teachers shared only to their sexualities. It was this very point that the teachers tried to drive – that they are more than their sexualities, which should not be used to define their experiences. Some of the discussions may thus appear incomplete. This is intentional – to focus on those aspects that the participants foregrounded. The paper seeks to shift beyond a singular narrative of victimhood and homophobia, and to suggest a much more complex, nuanced understanding of sexuality politics and teacher professionalism in South African schools today.

School dysfunction in South Africa: A review of literature

School dysfunctionality has been theorised to be directly caught up in the structural design of apartheid education. Through actions facilitated by the Eiselen Commission in 1949, the apartheid government developed a race-based schooling system that ensured the underdevelopment of African schools (Bloch 2009). Fataar (1997) aptly notes (citing the work of Navarro 1982) that the apartheid project wasn't simply about race but was also about class politics and realignment with the New Right in contexts such as the United Kingdom. Fataar (1997) argues that the objective was to reorder and recreate a world in which profit would increase – predominantly for white people. Around 1976, for instance, the state spent R644 per child annually on white children's education, compared to R42 allocated to African children. Indian children received an allocation of R189 per child and coloured children, R139 (Villette 2016). The effect of this excess investment on white schools was an education system that ensured and sustained economic success for white children on the backs of under-educated black people who served as cheap labour for a white South African economy and state.

The apartheid structural design also impacted on the type of education that was on offer. Chisholm (1999) argues, for instance, that white schools received quality education, with white teachers deemed to be professionals. This was evident in that teacher qualifications were prioritised in white schools. Conversely, for African children, teachers were often unqualified and there existed a prevailing shortage of teachers across the country, leading to overcrowding in these schools. African schools were also administered through white authority, with inspectors monitoring teaching practice. African teachers were deliberately rendered unprofessional, and schools mainly

served the economic and social interests of the white state.

The prevailing inequalities in African education, alongside the general condition of apartheid, resulted in the politicisation of education in African schools, particularly in secondary education (Cross 1993), with African learners resisting the inferior education on offer. Fleisch and Christie (2004: 99) note that 'principals and teachers in many [African] schools were thought of as instruments of the apartheid state, and consequently lacked authority and legitimacy.' Resultant political activity from students disrupted the delivery of education in schools. This political activism also extended to teachers through the emergence of the mass-based South African Democratic Teachers Union (SADTU), which led a 'defiance campaign' that unravelled the rigid teacher accountability regimes that were prevalent in African schools (ibid.). Many school leaders in township schools were thus expelled from their schools around 1992–1993.

Fleisch and Christie (2004) note that when the Government of National Unity took over in 1994, many African schools were effectively dysfunctional. Such schools were characterised by four sets of problems: poor physical and social facilities; organisational problems, including weak and unaccountable leadership; poor communication and insufficient disciplinary procedures, and poor communication with education departments (ibid.). These problems led to what Bloch (2009) estimated to be between 60% and 80% of schools in South African being dysfunctional. This dysfunctionality has largely been due to socioeconomic inequalities, resource unavailability, poor teacher content knowledge, poor management, poor quality of teaching and teacher training, lack of teacher accountability and problematic school cultures (Chisholm 2004; Bayat, Louw & Rena 2014; Munjo 2018).

Dysfunctionality has led to multiple interventions from government, in particular because education in postapartheid South Africa has been viewed as a panacea to social challenges faced by South African society (Fleisch 2008). Letseka (2014: 4864) argues that this focus on education is only an 'illusion' given the embedded dysfunction in schools and that, while educational access remains a constitutionally guaranteed right, 'the country's education system is so dysfunctional that ... constitutional ideals seem more like a mere pipedream.'

Teachers have been found to play a profoundly debilitating role in the levels of dysfunction discussed above. For example, Chisholm et al. (2005) note that some teachers in South Africa spend only 16 hours teaching, out of 41 hours allocated to school-related activities per week – less than 40% of school-related activity. Additional concerns pertain to mastery of content and methodologies in the classroom. Many teachers lack both the content and methodological knowledge required to assist learners in attaining their educational goals (Bloch 2009). This may explain the poor test results that have been flagged in many international benchmark tests (Munjo 2018). Msila (2014) suggests that militant teacher unionism may partially explain the persistent poor results in South African schools. Drawing from a study on teacher unionism in the Eastern Cape, he argues that strong political union affiliation amongst teachers has resulted in a paralysis between school management and teachers in the schools studied, with the culture of teaching and learning being adversely affected.

While the above discussion has largely centred on the African schools, it is critical to note that this is not to suggest that school dysfunctionality[2] is the exclusive reserve of African schools. It is true that school dysfunction exists in all teaching spaces in South Africa, albeit with patterns varying according to context. Indeed, while some former Model C schools and private schools may have prevailing cultures of violence, racism, discrimination and internalised domination, it is equally true that the culture of teaching and learning in these schools remains largely intact. However, in many African schools, the sustained history of apartheid continues to carry force and is embedded in these schools, with pockets of resistance and resilience existing. Disrupting embedded cultures that have taken decades and even centuries to cement will take time. This is especially so given that progressive policies that seek to undo the ravages and legacies of apartheid remain largely on paper with little implementation force. As witnessed in the findings of this paper, these dysfunctionalities continue to linger – even undermining professional teachers who seek to resist.

Teacher professionalism: A contested terrain

The fact that teacher professionalism is an elusive concept to define has been flagged by scholars the world over (Talbert & McLaughlin 1994; Sachs 2001; de Clercq 2013; Munjo 2018). Stevenson, Carter and Passy (2007: 2) argue that teacher professionalism is 'an ideological concept that is neither static nor universal, but located in a particular sociohistorical context and fashioned to represent and mobilise particular interests.' While disputed in terms of definition and meaning, teacher professionalism has largely been informed by three tenets, namely, abstract professional knowledge, autonomy, and accountability (Gamble 2010; de Clercq 2013). De Clercq (2013) also notes three components of teacher professionalism: behavioural, attitudinal and intellectual. This means that teacher professionalism can be impacted by both internal (school-related) factors and external (social) factors. In many international contexts, such as Australia, United Kingdom and the United States, notions of teacher professionalism have recently been imbued with neoliberal language of reform, caught up in teacher accountability and 'standard setting' (see Talbert & McLaughlin 1994; Sachs 1997; Whitty 2000). Ironically, the language of professionalism has been used to account for these reforms. Whitty (2000) argues that those involved in new educational reforms may perceive these reforms as efforts to re-professionalise teaching. Thus, he argues, recent developments in teacher professionalism should be seen as

[1] It is important at this stage to explore the meaning of school dysfunctionality in the context of this paper. Bergman (2013) notes that there does not appear to be a single definition of school dysfunctionality in literature on South African schools. While Bergman ends up presenting key criteria that can be used to assess school dysfunctionality, I shy away from doing this because there are a multitude of conditions in schools that may express a condition of dysfunction. I suggest that definitions of concepts like school dysfunction are mere academic reflections that are arbitrary and have no real meaning. For example, violence, whether covert or overt, impairs the process of teaching and learning and is thus an expression of dysfunction. However, violence alone cannot be the only indicator of school dysfunctionality. I suggest that all schools have some elements of dysfunction but for a school to be regarded as dysfunctional, those dysfunctions must be the dominating feature in the school, and such dysfunction must impair its culture of teaching and learning. Dysfunctions can include teacher and learner absenteeism, lack of accountability, lack of resources, poor management, deteriorating infrastructure, and so forth. While not seeking to present a definition, and purely to aid the reader, dysfunctional schools in this paper are seen as those schools in which structural and systemic conditions present multiple barriers that significantly impair the culture of teaching and learning, and the wellbeing of those who occupy such schools.

competing versions of teacher professionalism instead of being neatly separated between those who seek to de-professionalise teaching (reformers) and those who seek to protect the profession (critics of the reformers).

In South Africa, concerns around teacher professionalism have been circulating for some time, leading to the recently developed 'teacher-proof' curriculum in the form of CAPS (see Msibi & Mchunu 2013). Part of the problem around clearly locating teacher professionalism is the continued disconnect between policy and practice. Munjo (2018) notes that among the fundamental concerns in South Africa have been issues around the ethical conduct of teachers and the competence of teachers in the classroom. While the hallmarks of professional conduct, internationally, have been teacher authority, work ethic and autonomy, in South Africa, it has been teacher conduct that has received much focus in literature. For example, abuse in the classroom continues to be a strong feature of literature on teacher conduct in South African schools (Munjo 2018). Often, teachers operate with a high degree of impunity – despite the existence of the South African Council for Educators (SACE) governing teacher professional conduct. Persistent reports of continued use of corporal punishment in schools, the sexual abuse of learners, high degrees of absenteeism, staff's lack of commitment to fulfilling their responsibility, and incompetence (Munjo 2018) continue to dominate the discourse of teacher professionalism in South Africa.

Given the general negativity that surrounds teachers, it would be easy to paint them with one brush as altogether incompetent and unprofessional. However, many teachers resist this negative construction and offer outstanding services to learners, and in a professional manner. Osman and Kirk (2001), albeit in a higher education context, argue that teachers can be change agents and can offer transformative practices that can lead to the improvement of educational outcomes. Weldon (2010) argues that the makeup of South African society has been fundamentally impacted by the history of apartheid, and that schools are not immune to this influence, especially given the role that education plays in shaping society. For Weldon (2010), therefore, facing the violent history of apartheid is a critical element in changing school cultures and improving the conduct of teachers. This suggestion is consistent with Jansen's (2009) assertions on post-conflict theory, a theory that recognises the woundedness of all individuals who occupy South Africa and, also, its educational institutions.

Theoretical framework: Sociocultural theory

Schools are organisations in which certain rituals, ceremonies and practices are established and cohere in ways that regulate behaviour and conduct. They are hierarchical, with clear definitions and controls for authority (Christie 1998). Given the ways in which certain rituals and practices are practised, schools are essential agents for socialisation and its reinforcement. They thus 'relate people to each other in specific ways both within and outside their boundaries' (Christie 1998: 287).

This paper is interested in unpacking the various ways in which specific behavioural norms in

schools-as-organisations reproduce conditions of dysfunction. Sociocultural theory, particularly its ability to study 'everyday life' (Highmore 2002) was particularly useful for this study. Sociocultural theory enables a critical understanding of how structural conditions produce particular forms of behaviour, including the ways in which such conditions become ritualised. As argued by Edgar and Sedgwick (1999: 8), this relates to understanding social norms – 'norms that are institutionalised in society, and internalised by individual agents in the process of socialization.' Given that norms shape behavioural action, sociocultural theory enables the unpacking of structural processes that give effect to social acts. It was therefore no surprise that I found Pierre Bourdieu's work, particularly his concept of habitus, useful in framing the work of this study. Bourdieu (1977) argues that power is produced through cultural practices that are enabled by both structure and agency. This is due to habitus, defined as,

> our ways of acting, feeling, thinking and being. [Habitus] captures how we carry within us our history, how we bring this history into our present circumstances, and how we then make choices to act in certain ways and not others. (Maton 2008: 52)

Habitus thus pertains to our history and how this history and experience guides human behaviour and human interaction. Essentially, Bourdieu's habitus concerns the mechanisms that enable the production, reproduction and transformations of deeply buried social structures (Reay, 2004). Habitus 'is … embodied, it is not composed solely of mental attitudes and perceptions' (ibid.: 432). It thus involves both structure (in terms of social expectations and norms) as well as agency, the ability to act and do, as it pertains to individual action.

Bourdieu and Wacquant (1992) argue that it is the field, namely, the space in which social processes occur, that structures habitus. Therefore, individuals are not just machines who are a product and reflection of their history. Through his formula, *[(habitus)(capital)] + field = practice*, Bourdieu (1994) suggests that human practices are largely a result of their history as well as their individual values and positioning in a particular space (Maton 2008). Thus, practices are not simply reflections of habitus but, rather, are about the relationships between one's habitus and the individual circumstances being faced: 'On one side it is a relation of conditioning: the field structures the habitus ... On the other side, it is a relation of knowledge or cognitive construction. Habitus contributes to constituting the field as a meaningful world' (Bourdieu & Wacquant 1992: 127 as cited in Maton 2008).

In studying teacher professionalism in the context of school dysfunction, therefore, Bourdieu's concept of habitus was particularly useful. Through habitus, I was able to understand the practices of professional teachers in dysfunctional schools, including the reasons for their actions and possible factors that gave rise to such dysfunction. I was also able to unpack the various ways in which established structural norms are ritualised and reproduced. The framework also assisted in providing an analytical tool for understanding human behaviour, particularly in institutional spaces rife with apartheid history.

Methodology

Given that this paper is drawn from a larger study to explore the life experiences and histories of the participants, life history methodology was a natural methodological fit for this study. Goodson (1980: 66) stresses the relevance of the methodology for such studies, noting that

> the greatest strength of the life history lies in its penetration of the subjective reality of the individual: it allows the subject to speak for herself or himself. But above and beyond this, the life history 'can give meaning to the overworked notion of process.'

Eight participants were selected using snowball sampling. Given the sensitive nature of the wider study, obtaining participants through any other approach may have proved difficult because individuals who claim same-sex-loving identities are not always immediately open to discussing their lives, especially because of the homophobia that exists in society. Jackson (2004) notes that it is a challenge to access gay and lesbian teachers because they are particularly vulnerable in society. Thus, snowball sampling, given its ability to locate vulnerable groups and to retain their anonymity throughout the study process, was useful. The eight participants in the study were obtained through referral techniques, that is, participants referred me to other potential participants who, in turn, referred me to more individuals I could contact.

The participants all taught in different schooling contexts and, apart from a few cases (Musa knew Andile and Langa), did not know each other. None disclosed their sexuality in schools, but were suspected of being gay by their peers – suspicions largely articulated as jokes in the staffroom. However, the fact that some participants had girlfriends and children appeared to have allayed such suspicions. Most were qualified teachers with Bachelor of Education (BEd) degrees, except Bongumusa and Senzo who had diplomas in education. Bafana was under-qualified, completing his studies while employed. Table 1 shows the profiles of the teachers who participated in the study.[3]

Table 1: Profiles of participants

Pseudonym	Age	Context	Years teaching	School level	Relationships with women	Children	Subject
Bongumusa	47	Rural	26 years	High	None	None	English
Musa	30	Township	7 years	High	Engaged	Three	English
Senzo	43	Rural	18 years	High	Girlfriend	One	Math Lit
Langa	32	Rural	4 years	High	None	One	Tourism
Andile	30	Township	5 years	Primary	Girlfriend	One	-------
Phumlani	28	Rural	5 years	High	None	None	Maths
Bafana	23	Township	3 years	Primary	None	None	--------
Sanele	39	Township	18 years	Primary	Separated	Two	--------

[3] Subject majors for primary school teachers are not shown because these teachers are expected to teach all the subjects.

Three strategies were used to generate data: in-depth interview conversations, timelines, and personal documents collected by participants. Each participant was interviewed four to eight times in sessions lasting two to three hours each. Documents such as diaries and newspaper excerpts were collected. For the purposes of this paper, only the data generated through the interview conversations will be discussed because the issues discussed in the paper only emerged during interview sessions. All interviews were conducted in the language preferred by the participants.

Ethical considerations were taken into account, with approval obtained from the University of Cambridge. Every participant signed individual consent forms that guaranteed anonymity, confidentiality and the right for the participant to withdraw at any point of the interview process. Given the sensitive nature of the study, participants were also given the option to not sign consent forms but to agree to participate through digital recordings. All participants elected to sign the consent forms. To protect participants, pseudonyms were allocated to each one.

Data was analysed using Spencer, Ritchie and O'Connor's (2003: 213) analytical hierarchy, which pertains to 'thematic, largely cross-sectional analysis based on interpretation of meaning.' The choice of this approach was driven by the potential it offered for scaffolding and repeated analysis. Because this study had voluminous data, the generic hierarchical construction of the approach assisted me in managing and analysing data in a thematic manner, allowing for 'the ability to move up and down the analytical hierarchy, thinking conceptually [and] linking and nesting concepts' (ibid.: 213). The analytic hierarchy essentially involves three stages of analysis: data management, the formation of descriptive accounts and, finally, providing explanatory accounts.

In analysing the data, I read the transcribed data several times in order to familiarise myself with the issues that had emerged. The data was then coded and categorised on the basis of commonalities between participants' expressions, silences in the data, and nuanced differences and similarities between data generated and existing literature. Patterns started to emerge in the categorised data and these patterns were organised into themes. For this particular paper, the presented data reflects areas which, while not necessarily linked to the concerns of the main study, emerged as repeated utterances by participants. The study had not aimed to explore school dysfunction and the corruption that exists in South African schools. However, it was during the process of data generation that these issues emerged as critical areas of theorisation.

Findings

As alluded to in the methodology discussion above, the findings of this study are drawn from a larger study on African male teachers who engage in same-sex relations. The key finding of the wider study was that the eight interviewed teachers drew on strong professional identities, what I call hyper-professionalism, in order to minimise attention from their same-sex-loving identities at work, and to gain respectability. In the two scholarly outputs mentioned earlier (Msibi 2018, 2019), I argued that this type of hyper-professionalism was largely framed on excellence, authoritative power and hard work, and that it involved the relegation of personal matters to the private space. The teachers sought to master their subject content knowledge and cared for their

learners, which resulted in their being liked by their learners, parents and principals (especially because they were viewed as competent). Their professionalism was evident in the fact that the high school teachers obtained learner matric pass rates well above national and provincial averages[4]. In fact, teachers teaching in subjects outside the sciences had sustained records of 100% pass rates in their subjects, with many of their learners also obtaining distinctions. While teachers teaching science and mathematics did not obtain the same 100% pass rates for their subjects, they nevertheless also had learner pass rates that could be deemed as excellent, and averages that were well above national and provincial averages. For those teaching at primary school level, I found that excellence and professionalism were demonstrated through the initiation of extra-curricula activities to support learners.

All the teachers during the interview process emphasised that they were professional. Amongst the key ways in which they sought to exhibit their professionalism was through adherence to the South African Schools Act (1996) and the SACE code of professional conduct. This professional conduct was enacted, for instance, through the rejection of unprofessional acts such as having relationships with learners and the administration of corporal punishment.

While enactment of these forms of professionalism gave them power in contexts where their managers did not feel threatened, or where schools were largely functional, these teachers were found to be exposed where conditions of dysfunction prevailed – especially in contexts where they were seen to be disturbing an established normative condition of non-performance by their peers. I will demonstrate below, through the presentation of three themes, that due to the embedded normative culture of dysfunctionality in the schools where these teachers were teaching resulted in them being seen as threats, the interviewed teachers were pushed out in order to sustain a condition of dysfunctionality. Three strategies were used to push teachers out: 1) threats of violence, 2) sabotage and undermining tactics and 3) lack of promotion. Below, I present a discussion on each of these themes.[5]

Pushed out through threats of violence

As highlighted, the male teachers who participated in this study adopted hyper-professionalism in executing their duties at school. Because of the acclaim this professional conduct brought to their

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4 The matric pass rate may not necessarily be reflective of the abilities of teachers and their professionalism. However, it became clear that there was a direct correlation between the attainment of learners in matric and the individual efforts of the interviewed teachers. For one, the teachers interviewed obtained average subject pass rates well above their school average norms. Some teachers were called to train other teachers in their regions, and to offer tutorial support on radio stations due to the consistent performance of their learners in attaining high matric pass rates. The fact that the teachers narrated accounts of being in class teaching every day, for the full required hours and more (including extra lessons), suggests a professional disposition of heightened work ethic and individual accountability that is well aligned with international norms of teacher professionalism. The claim here is not that same-sex-loving teachers are more professional than their straight counterparts, rather, that due to their marginalised identities, the interviewed teachers adopted professional dispositions that removed attention from their sexualities to their professional practices at school and in the classroom. That same-sex-loving teachers appeal to hyperprofessionalism in order to draw attention away from their sexualities has been theorised in other contexts (see Neary 2013).

5 I have provided a rather lengthy background to the findings in order to provide the reader with background information on the type of professional conduct that the teachers exhibited.

schools, especially in contexts where they were not perceived as threats by peers and managers, the participants generally obtained high levels of respectability and power in their schools. This was, however, not the case in contexts where the principals were not competent, or engaged in corrupt activities, or where there was general dysfunction in the school. In such contexts, the teachers became threats to their managers and peers, and their lives significantly exposed.[6] Thus, these teachers became what some participants called 'school hoppers' (Sanele), that is, they moved from one school to the next in search of functional spaces in which their safety and protection were guaranteed, and in which they could obtain respectability.

One participant, Senzo, shared a powerful narrative on how his professional conduct and dislike of corruption almost led to his death in school. Senzo, a choir master at the time, had been active in school and had formed a school choir. Keen to expose his learners to other contexts, particularly city life, he organised a tour for his rural learners that would have taken them to a choir competition in the city. Learners were expected to make contributions towards transport costs for the trip. However, due to unforeseen challenges, the trip did not take place. Rather than returning the money to the learners who had paid, Senzo approached the principal to ask him to open a bank account so they could use the money for another choir trip later in the year. The principal took the money but did not open the account. When the learners enquired about the money, the principal pointed his fingers at Senzo, claiming that Senzo had misused the money. When it emerged that, in fact, it was the principal who had misused the money, he tried to 'remove' Senzo by hiring learners to kill him. Narrating his story, Senzo noted:

> By that time, he hired some of the students to shoot me. In fact, I was meant to be shot in 1997 November, but the boys said, No. In January when I went back to school, one boy came to me and asked me where I stay, and then I asked what kind of a question is that? Then he points at me and says, 'You are going to die.' Then I ask, 'From what?' he says, 'Didn't you know?' I said, 'Know what?' He says, 'You were to be shot'... He says, 'Me and another guy were bought by the principal to shoot you'... So, after that came out, I decided to move.

That narrative reveals the levels of dysfunction prevalent in some schools in South Africa. It may seem unbelievable that a school principal would hire learners to kill a teacher. The levels of corruption and professional violations captured here not only flag the dangerous levels of dysfunction that prevail in South African schools, they also capture the various ways in which violence assumes a normative positioning, with even school children being brought in to sustain it as a cultural norm in their schools. Newspaper reports of teachers suspiciously killed in KwaZulu-Natal are not infrequent (see Singh 2015). While the claim of this paper is not that all teachers who are killed in such contexts are killed for their professionalism, the narrative from Senzo does, nevertheless, point to serious challenges in the system.

It was clear from the data, that Senzo was emerging as a key threat to his principal and the money

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[6] Offered here, are the narrative accounts of the participants. Life history research does not offer an 'objective' balancing of views between parties. The aim is to present the narrative accounts as presented by the participants. These are not taken as 'truths' or 'facts' but purely as accounts as presented by participants.

scandal was a tactic for the principal to get rid of him. Senzo was at that stage a successful qualified teacher of agricultural science, respected in the community for the extra lengths he took to support his learners and for producing good results. His work ethic and individual forms of professional accountability ensured his respectability, which in turn became threatening for his superior.

A key exploration of literature on school dysfunction has been the issue of institutional authority. Christie (1998: 287) notes that, 'schools tend to be hierarchical, with ranked levels of authority.' The response from the principal above can be contextualised within a South African schooling space where authority remains highly questioned, resulting in dictatorship and authoritarian conduct by some school leaders. Clearly, this culture of dictatorship manifests in violence, given the general ways in which violence has been socially embedded as a normal condition in South Africa. It was clear from all the participants studied, that some principals treated schools 'as their homes,' and demanded that they be respected in ways that reflected this. By asserting himself through speaking back to the principal's untruth, Senzo was seen as questioning the principal's authority and therefore opened himself to attack.

Bourdieu (1977) argues that individual experience is simply a reflection of the social forces and structural configurations present in a particular context. Therefore, Senzo's experiences in this context are driven by a normative condition of dysfunctionality that becomes embedded and reinforced through pushing out those acts and actors that are perceived to possess the potential for change. The principal simply acted out the habitus of a context riddled with a history of dysfunctionality that must be sustained at any cost, even if the cost meant the murder of a teacher.

A similar story was relayed to me by Bongumusa, who informed me of his friend, an excellent school principal who coincidentally also engaged in same-sex relations, who was forced to leave his school after refusing to reappoint temporary teachers who had underperformed the previous year. When he appointed five new fully qualified teachers in the place of truant under-qualified teachers, there was a revolt in the school, with the teachers demanding the reappointment of the truant teachers because 'they had served the school longer than the new teachers.' While one might not wish to immediately jump to the principal's defence, not least because there may have been more to the matter, it remains clear that school and contextual dysfunctionality are reproduced through habitual practices that become embedded in the school cultures. While these practices can be resisted, their sense of normalcy makes them established. Maton (2008: 54) notes that 'each social field of practice (including society as a whole) can be understood as a competitive game or "field of struggles" in which social agents strategically improvise in their quest to maximize their positions.' This becomes obvious in the two examples above. Senzo's principal arranges a 'hit' in order to safeguard his threatened position, while the teachers in Bongumusa's narrative seek to protect the interests of their colleagues and, thus, maintain a normative position of dysfunctionality through the forced removal of their principal. The idea that a principal can be driven out of a school while trying to establish quality is a serious concern, flagging some reasons why some schools continue to be dysfunctional in South Africa.

Pushed out through sabotage and undermining

Apart from the death threats and violent removals discussed above, the teachers in the study argued that they had left their previous schools due to being disliked by colleagues and, sometimes, due to being sabotaged by their school management. As noted earlier, teachers who felt supported often took strong leadership positions in their schools, while those who did not get this support ended up taking a backseat and simply doing their work. As Phumlani put it: ‘So long as you know that you are doing your work well, what else matters?’ Teachers in unsupportive schools often found themselves exposed to hostility aimed at undermining them in front of their learners and colleagues.

Musa shared a disheartening story of how his first principal in the rural areas went out of her way to destroy him, mainly because of his professional conduct and professional qualifications, both of which were viewed as potential threats by the principal. Musa had not been the principal’s first choice when he was appointed because he possessed a similar qualification to hers. Musa held a degree in education while others at his school, apart from the principal, were either unqualified or held diplomas. The principal had a degree, a qualification similar to Musa’s 4-year BEd. It did not help that, when Musa arrived at the school, he started obtaining 100% learner passes in his subject, something that had not previously occurred in the school. Musa then became a victim of sabotage, designed to make him feel inferior and unwanted. He explained the ordeal that followed:

> They ill-treated me so much ... I was fresh out of university and given matric (Grade 12) with absolutely no form of support. They sabotaged me. In March, I remember I had two matric business economics groups. I went up to one of the classes to return the learners’ scripts because the previous day we had a test. I said, ‘Good morning class, here are your scripts,’ and they all responded: ‘We don’t take business economics anymore!’ I said, ‘What! How come?’ They told me that they were told [by the principal] to delete it ... That year was horrible for me. I was crying everyday ... When the position became permanent, I knew they wouldn’t give it to me. They went all the way and searched for a person to replace me ... Unfortunately for them, she got a better offer in the township and did not take the position. I was placed Number 2 and so they were forced to take me again! I told myself I’m going to show them. The results were even better. I got 100% and seven As ...
>
> There was a time when the school had to stop because of me. They convened an urgent meeting for me. I wore a shirt and did not tuck it in, and they called an urgent meeting for me. I used to cry at night. In my second year, they had a meeting with the parents. They [said] there’s this young teacher who must be fired because he’s going out with their kids. Unfortunately for them, the parents refused because the kids were speaking about me at home and how good I was. They even thought I was giving the answers to the learners. When I was teaching, they were peeping and looking at what I was doing ... They even moved the photocopying machine to my class to see what I was doing.

This narrative similarly illustrates the nature of the dysfunctionality in many South African schools. Musa’s story reveals how his professional attainments had become threats for his peers and his principal, all of whom were unfamiliar with a teacher who had a mastery of his content knowledge, leading to his learners obtaining greater results. Through Musa’s professional work ethic (supporting learners through sound teaching), he was able to move his rural learners to obtain

a 100% pass rate in business economics.

I suggest that in contexts where mediocrity is normalised, the regulatory mechanisms of cultural maintenance work to position excellence as antithetical to school norms. Musa's professional conduct became threatening to his peers and principal to the extent of them moving the photocopying machine to his classroom in order to monitor what he did in class. While this may appear petty and unrelated to professionalism, it is precisely this trivialness that sabotaged and undermined Musa in front of his learners – to the extent of forcing learners in Grade 12 to change their matric subject just to get rid of Musa.

Interestingly, it is also discourses around professionalism that were employed to discipline and undermine Musa. He was called to a meeting for not tucking in his shirt, for example. He was also perceived as giving learners answers to questions to render comprehensible the fact that they all were doing so well. He was also falsely alleged to be going out with learners – all actions that seek to present him as an unprofessional teacher who is not required in the space. These are modalities and techniques of structural power (Bourdieu 1977). Dysfunctionality becomes a habitual practice to the extent that those who employ agentic means to break through established practices are the ones pushed out. The principal and teachers are only a reflection of their history and context. They employed 'a system of dispositions to a certain practice, [which is] an objective basis for regular modes of behaviour, and thus for the regularity of modes of practice' (Bourdieu 1990: 77). They created regularities in the school – regularities that have as a rule the maintenance of a dysfunctional status quo. It is also clear from Musa's narrative that the negative treatment was a result of his advanced qualifications (compared to his peers) and competence in teaching his subject (professional authority over content). Instead of being celebrated, and for the other teachers to learn from him, he was attacked and sabotaged. Musa's narrative is similar to that of almost all the teachers interviewed in this study who had moved from their initial schools. Teachers who taught in schools where the management team did not approve of their excellence and professionalism were often subjected to sabotage, negativity and hatred, largely due to perceptions that they were threats in those schools. These teachers were forced to leave their schools and to move to schools where their professionalism would be supported and appreciated. They became school hoppers.

Pushed out through lack of promotion

The last theme I explore relates to the ways in which the professional dispositions adopted by the teachers impacted their promotion ambitions, especially in the broader system dysfunctions that characterise education in South Africa. I argue in this section that the toxicity of the South African system often results in competent, professional teachers being stuck in the system and being unable to get promoted largely due to cronyism and undue interference from unions. While unions have publicly denied interfering in the selection and recruitment processes of teachers and principals in schools (see Gqirana 2016), the narrative accounts from the interviewed teachers suggested a different story. These teachers highlighted their awareness and knowledge of corrupt practice in the recruitment processes in schools, practices that often resulted in promotion

positions being reserved for individuals preferred by the unions. Only in one case, that of Musa, who is now an acting deputy principal in his school, did I find a narrative account suggesting that promotion opportunities were conducted on the basis of competence and merit. Bongumusa, who was promoted to deputy principal more than 15 years ago, shared how his professional conduct and refusal to join a particular union had resulted in him being unable to progress to senior positions. Bongumusa argued that he could not join a union as a professional teacher due to unacceptable conduct by some of his peers who are part of the union. He partially blamed unions for the dysfunction present in some schools. He noted:

> I have applied more than four times for senior jobs. I have been deputy principal for some time now. I wanted to be principal. This last time even one of the guys in the panel told me that they wanted me, but they said they cannot employ me because I don't belong to the right union. This has happened to me several times before ... I'm in a profession that I love but without the conflicts around it ... but it's the best profession ... I think about my learners whenever I think of leaving.

Without seeking to glorify the teachers interviewed for this study, and without seeking to brush all unions with the same brush, it was clear that the teachers interviewed were passionate about the education of their learners, and that they wanted to make an impact on the livelihoods of young children – but were often prevented from doing so due to cultures of dysfunction prevalent in the education system. This is evident in Bongumusa's assertions above. The fact that Bongumusa had applied for more than four positions and in each case was found to be appointable, and was told in unequivocal terms in the last interview that he was the best candidate but was still not employed, is concerning. Participants spoke of *ukuphelezela* [accompanying someone] – going for a job interview although the panel had already selected a candidate – as something they all were aware of, and which was the order of the day in many schools. These experiences have captured aptly the perils of teacher professionalism in South African schools. Professional teachers are forced to align with dominant, unprofessional discourses if they wish to obtain recognition and progress in the system. Failure to do so results in penalties like those experienced by Bongumusa.

Bongumusa's narrative suggests that he had the experience (having taught for more than 25 years, managed a department and deputised for his principal for over a decade), qualifications and the professional conduct (expressed through ethical practices and authority over his content knowledge) to be appointed as principal. It is clear that he performed well, hence the calls he received from the panel member. Bongumusa informed me that this occurred in at least three of those interviews –he was told by others that he had performed well. Bongumusa maintained that union members were using management positions for deployment purposes, and that this was the only reason he was not appointed.

I have already alluded to the effects of history on current practices in schools. Clearly, the habitus of professional teachers does not necessarily align with the dominant structures of the field. The response from professional teachers is to remain in the field, albeit feeling like 'fish out of water' (Maton 2008: 57). The practices present in everyday engagements in South African schools are informed by objective conditions that allow dysfunctionality to continue unabated. The fact that

union participation has become a known rule of the game in promotion opportunities clearly demonstrates the ways in which the structure sustains its position of dysfunctionality; those who conform receive promotion while those who fail to conform are shunned or driven out. While Bongumusa wasn't pushed out of his school, he was pushed out of senior positions. Bongumusa only remains in the system 'for the love of [his] children.' Maton (2008: 58), drawing from Bourdieu, (1977), notes that the reason for such actions are aligned to habitus and its role in the field: 'We learn, in short, our rightful place in the social world, where we will do best given our dispositions and resources, and also where we will struggle.'

The reader, at this stage, may be questioning the positioning of an all-empowering social structure that defeats teachers through pushing them out of the system. This is not what this paper is arguing. As Bourdieu (1977) pointed out through the concept of habitus, the conditions of the field exist within both agency and structure. However, only a limited range of possibilities are ever available in social practices, given the limiting effects of structural dictates on agentic acts (Reay 2004). Some teachers choose to resist through remaining in the system, thereby indirectly sustaining the regulating power of the structure while many others, frustrated by high levels of dysfunction and similar blockages as those highlighted by Bongumusa, are pushed out of the profession and leave permanently. In both cases, while individuals do resist, the structure remains intact, albeit slightly impaired.

So, where to from here?

It is clear that the narratives of the interviewed teachers suggest a condition of dysfunction that negatively affects teachers who seek to act professionally. While the study was small-scale, it does give preliminary understandings of some of the challenges sustained by prevailing school cultures in South Africa. However, the conditions explored here need to be understood within a national and individual habitus that is informed by a history of pain, inequality and general social dysfunction. The findings demonstrate various ways in which apartheid consciousness and conditions continue to shape the daily experiences of individuals in South African schools. At a structural level, schools continue to reproduce normative practices in place during apartheid. While some teachers and principals seek to resist this condition, these forms of resistance become caught up in habitual practices that have become normatively positioned and reproduced through recitation. Thus, resistance becomes limited. This, however, is not to say that these habitual practices are deterministic and result in a state of paralysis across all school settings. Clearly, this is not the case. The participants were able to find schools where their professional practice and conduct were appreciated by colleagues and principals, leading to their respectability at work.

This paper is making serious claims with vast implications for both research and policy. The call is for government action. While policy reforms in South Africa have sought to respond to dysfunctionality from a regulation perspective, little effort has been made to undo the role of structures at the core of institutional practice. In a country that instituted systems to develop citizens as second class, the question should be whether centuries of deliberate action can be

addressed through policy imperatives that do not undo, at a psychological level, the woundedness of people. Can we expect wounded people to fight new wars without first addressing their wounded state? A further implication is for research: a much larger study is needed in order to understand the extent of the problem.

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Complexities of professional practice in South African education

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Abstract

The professional practice of teachers in education in South Africa is currently being seriously challenged on several levels. Part of this challenge has to do with the need to transform South African education into a postapartheid and postcolonial framework. Notions of professionalism that emphasise autonomy, prior learning, expert knowledge (Abbott 1988), abstract thinking and disciplinary based knowledge (Shalem & Slonimsky 2014) do not seem to enable teachers to deal with the complexities of the contexts they face in their practices. This article addresses the importance of relooking at what the key features of professionalism and professional practice may be in a context where the call for decolonising knowledge, recognising the suppression of historically disadvantaged people, and increasing access to a postcolonial society is being made. Based on current experiences in the South African schooling system, this article argues for a need to revisit assumptions about professional knowledge, professionalism and professional practice from abstract, ahistorical conceptions of these notions.

Keywords: Postapartheid teachers, professionalism, professional knowledge, professional practice, identities, postcolonialism

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Introduction

This article focuses on teachers who teach in primary and secondary schools in postapartheid South Africa. Teachers are regarded in this article as professionals but, as will be clearer later in the article, they are more than just professionals. At the same time, given the challenges that postapartheid South African teachers face, what constitutes professionalism, professional knowledge and professional practice are also being questioned and traditional assumptions of what these notions mean are being interrogated to (re)construct a postcolonial order. The article looks at these challenges of postapartheid teachers and at the notions of professionalism, professional knowledge and professional practice in the context of postcoloniality and its attendant deep-seated challenges.

The article demonstrates that traditional assumptions about professionalism, professional knowledge and professional practice tend not to consider who the professionals are and the contexts within which they practice – and which shape their professional practice and identities. The contexts within which professionals find themselves, the material conditions of their work and the ways they are structurally positioned impact on their sense of professionalism and how much autonomy they have when making judgements in specific contexts. Approaches to professionalism, professional knowledge and professional practice that ignore such material conditions, contexts and experiences are argued, in this article, to be ahistorical and counterfactual. They project professionalism as abstract, and do not engage with the ways in which professionalism is experienced in practice. To enable professions to sustain themselves in current complex contexts such ahistorical and abstract approaches to professionalism are shown to be unhelpful and reductionist.

The identities of teachers in postapartheid contexts

Teachers are professionals but they are more than professionals too. This section looks at the various identities that teachers possess. It points out that whilst teachers are professionals and this a necessary condition, it is insufficient. Therefore, the argument here is not to suggest that teachers are not professionals. Rather, it argues that teachers are more than professionals. These other identities have to do with social categories to which teachers belong, and which construct who the teacher, in fact, is.

This article does not engage with the many approaches to identity that are current. The article mainly works with critical theory and post-structural and postcolonial conceptions of identity, which indicate that identities are constructed in complex ways on multiple levels that include socioeconomic, political and cultural levels, and operate on macro and micro levels of societies. It also assumes a de-essentialised view of such identities – which means that, within individuals, multiple identities are found and these identities intersect with each other. These identities are also constructed within complex matrices that connect global orders with local contexts and point to a network of relations in which identities are linked to dominant epistemological forms and

sociopolitical and economic systems (see Foucault 1970; Hall, Held & McGrew 1992; Bhaba 1994).

This section now looks at the multiple identities teachers possess and indicates how these identities come to bear in postapartheid teachers' experiences. It covers notions of professionalism, the structural contradiction of teachers and the social categories to which teachers belong.

Professionalism, professional knowledge and professional practice

General and traditional assumptions about what constitutes professionalism, professional knowledge and professional practice seem to ignore the impacts of context and the material positioning of professionals, which determine how their professionalism manifests in practice. Such assumptions tend, therefore, to be framed in ahistorical and decontextualised ways. They are ahistorical because these assumptions do not take time and space in which practices occur into account, and they are decontextualised because they do not consider how the material conditions in specific contexts influence professional practices and professional identities. The reductionist thinking that seems to inform such traditional accounts of professionalism, on one hand, separates professionals from others in society and, on the other hand, projects them in polarised and abstract ways.

Teachers are regarded as professionals. This conception of teachers as professionals is based on the general view that professionals are those who have prolonged periods of prior training that equip them with specialised knowledge and expertise to perform a function in society that cannot be done by those who do not have such training, knowledge and expertise. For Abbott (1988), such specialised knowledge and expertise are an accumulation of abstract knowledge that should be applied in different contexts. And, for Abbott (1988), this accumulation of knowledge is acquired through the prolonged training that professionals are meant to develop competency in before they are qualified or certified as professionals in their field.

Winch (2014), however, emphasises that the specialised accumulated knowledge that professionals acquire is meant to inform their judgements in practice. For Winch (2014), then, professional knowledge is what enables professionals to make judgements in practice, and it is assumed that such judgements can be made no matter what the context is. Shalem and Slonimsky (2014) add to this view by indicating that such expert knowledge is knowledge that is disciplinary based and the judgments professionals make deductively draw on such disciplinary knowledge.

Implicit in these views is the assumption that professionals make, or ought to make, such judgements based on their professional knowledge – independently and autonomously. Hoyle (1997) notes that it is due to the possession of professional knowledge that professionals are given official or legal status that empowers them to make such judgements autonomously. This legal status accorded to professionals is because professionals provide a service to people in society, and it constructs professionals and their professional judgements to help people in society with their lives.

In practice, this means the following, using teachers as an example: as professionals, the legal

status given to teachers (following Hoyle 1997) is given to them upon their graduation from teacher training institutions. In South Africa, this certification is first done by the teacher training institution and, upon graduation, all teachers are expected to be registered with the South African Council of Educators (SACE), a statutory body that registers certified teachers as professionals and accords them legal status as professionals. Teachers are only allowed to graduate once it has been demonstrated that they possess the specialised and expert knowledge that has been used in their training and which construct them as teachers. Based on this acquired specialised knowledge, teachers are then expected to deductively (Shalem and Slonimsky 2014) draw on such knowledge to make judgements (Winch 2014) in contexts. As should be evident, such assumptions about professional knowledge and professional practice (and judgements) are treated in ahistorical and decontextualised ways. Put simply, a teacher is a teacher certified and mandated to make professional judgements no matter where they find themselves practising.

Such views of what constitutes professionalism, professional knowledge and professional practice are also reductionist in their approach. Teachers as professionals are reduced to being just that – teachers. They are specifically trained only to teach, and society mandates them and trusts them to provide the service of teaching to them. This reductionist approach has the effect of separating professionals from others in society and thereby constructs a polarisation. Professionals are constructed as professionals based on knowledge that others do not possess. Professionals are thus not like others. They are separated from others in order to construct them as professionals. The result of this separation is that it strips away any conception of professionals also sharing experiences and identities with others in society. Professionals remain gendered, classed, raced and so forth, even though they may be professionals. But the reductionist thinking used to conceptualise and construct the identity of professionals tends to project them in abstract ways that polarise professionals from others in society. Such reductionist thinking, thus, ends up being abstract, ahistorical and counterfactual.

Whilst the reductionist tendency in the approaches indicated above may be clear, it is, however, for good reason that such approaches emphasise the defining characteristic of professionals in terms of the professional knowledge and expertise that they possess, and upon which they deductively make judgements. This is because a professional is somebody who has knowledge that others do not possess, and it is because of this knowledge that they are regarded as professionals in their respective fields. One goes to a medical doctor to be treated, one goes to a teacher to be taught – precisely on the assumption that they, as opposed to others, possess the knowledge to enable them to treat you and teach you. The knowledge of the professional, thus, defines her or his function and professional identity. It is a necessary condition for becoming and being regarded as a professional.

This article does not deny this necessary condition of a defining characteristic of professionals in terms of their function and professional knowledge base. What this article puts forward is the argument that, whilst this may be a necessary condition of professionals, it is not sufficient. It is insufficient because professionals are not only professionals, but are more than that. They carry

within them multiple identities and these need to be considered because they shape their professional practices and their senses of self. This condition is also insufficient because where, when and with whom professionals are expected to provide their services profoundly influence their professional practices. The professional knowledge of professionals, thus, provides the necessary basis for being professionals but it is the context, conditions, and the person they are that construct how they exercise their professional identities in practice.

Following Abbott (1988), Jensen, Lahn and Nerland also point out that the traditional view of professional knowledge as abstract is 'simplistic' and does not consider the complexities of material conditions and contexts; they argue that 'the tasks of [today's] practitioners go beyond predefined knowledge to handle the particular case or client's needs' (2012: 4).

Traditional conceptions of professionalism that highlight, in reductionist ways, the professional knowledge of professionals, and abstract professionals and professionalism from contexts are, therefore, also ahistorical. By not considering the material positioning of professionals, the identities professionals carry because of their social categorisation and the material conditions and contexts they are expected to practice within, such traditional views tend also to be counterfactual. They are counterfactual because they do not relate to the actual experiences of professionals. They tend to project professionals chimerically as if they are not human beings too. They are also unhelpful because if conceptions of professionalism do not consider the ways in which professionals struggle to practise their professions, despite the conditions that they face, they do not help in taking professions forward and enabling them to sustain themselves.

The next section considers the extent to which teachers are both professionals and workers, and this is followed by a focus on the identities of teachers and the ways identities challenge teachers' professional practices in contexts.

The structural contradiction of teachers and teaching

Teachers are not only teachers. Historically, they have also been viewed as occupying the positions of being a professional and a worker simultaneously. Eric Olin Wright (1979) pointed out that, as members of the middle class, teachers tend to manifest the features and sensibilities of members of both the working class and the upper class. This being the case because they occupy the layer of class that lies between the upper and working classes. Olin Wright (1979) also indicated that whether members of the middle class react as the working class or as the upper class depends on the context that members of the middle class face, their interests at specific moments, and where they perceive their interests being most met at such moments. Members of the middle class, thus, tend to vacillate across classes and, for Olin Wright (1979), such vacillation is structural due to the material positioning of the middle class between two contradictory classes (working and upper classes). This structural contradiction of members of the middle class has influenced the way teachers experience their class location and their sense of professionalism.

For teachers, this structural contradiction is also manifested in them responding to issues as professionals at some moments, and as workers at other moments. Shalem (1990) noted that, in the

South African context, this structural contradiction has been present in the way teachers have been positioned – and these positionings have echoed the experiences of teachers elsewhere in the world. In the South African educational system, these contradictions have also been racialised under, and due to, apartheid.

Historically, South African teachers have been polarised by racial inequalities, which have been compounded by the structural contradiction of their material positioning – resulting in mainly black South African teachers veering in the direction of working-class identification, and white South African teachers inclining towards a professional, more middle-class sense of themselves (see Carrim 1997). Whilst, currently, most teacher formations in South Africa acknowledge that teachers are both workers and professionals, they tend to emphasise one over the other most of the time.

Teachers in the postapartheid educational system have also been characterised by different reactions at different points in time (see Carrim 2017). Curriculum 2005 (C 2005) was in place from 1994 to 2000. It was then replaced by the Revised National Curriculum Statement (RNCS) in 2002, which was replaced by the National Curriculum Statement (NCS) in 2012. Curriculum Assessment Policy Statements (CAPS) replaced the NCS and is currently in use. Given that postapartheid education is periodised from 1994 to 2000, 2000 to 2012, and 2012 onwards, one notes that in the first period, teachers' ideological roles in constructing a postapartheid South Africa were most prominent. From 2000 to 2012, teachers' rights as workers, especially in terms of the conditions of their work and salaries received, seem to have been more emphasised. In the period from 2012 onwards, due to the prescriptions of the CAPS and the stipulations of performance outcomes of CAPS, teachers' subject teaching gained more prominence (CAPS is discussed in more detail later). This means that in the past two decades, postapartheid teachers have experienced and expressed their sense of identity and professional practice in different ways, and they have manifested the structural contradictions of their material positions.

Teachers also do not share the same status as other professionals in society. For example, lawyers and medical doctors are more highly regarded and respected in society than teachers, despite them all being characterised as professionals. This adds to the contradictions that teachers experience. Not only are teachers in a structurally contradictory location due to their middle-class positions, they are also in a structural contradiction because, although they are professionals, they do not experience their conditions of work as professionals but, rather, as regulated and prescribed.

Lawn and Ozga (1981) pointed out that, whilst teachers are regarded as professionals, their conditions of work do not equip them with what they need to practise as professionals. Lawn and Ozga (1981) also pointed out that teachers as employees of the state do not experience the same sense of professional autonomy as other professionals (e.g., medical doctors) – they are bound by prescribed curricula, have to ensure that they meet the outcomes demanded of them by government, the economy and society at large and, their actual work is regularly subjected to proletarianisation through the intervention and use of technology in education, which reduces their mental work.

In the current postapartheid educational system, teachers are expected to see to the realisation of CAPS, the curriculum currently in place in schools. They are also expected to contribute to building a postapartheid in that they are expected to produce people who are equipped to engage with a global economy characterised by the increased use of digital technologies (Department of Basic Education 2014). From C2005, through the RNCS, NCS to CAPS, what one notices is that the curriculum becomes more and more prescriptive – to the point where CAPS stipulates what needs to be taught, by when, and what assessments need to be used (see also Shalem, 2018; Shalem et al. 2018). Shalem et al. (2018) question the extent to which teachers are able to choose what they want to do in practice. They also note that under the conditions of CAPS, at best, teachers have limited and proscribed control and autonomy in comparison to other professionals.

The overwhelming finding of most current research, however, has to do with the challenges teachers face in meeting the CAPS curriculum requirements. In the research, it is pointed out that in contexts where the dominant language used in the school is not the first language of pupils, the difficulties in realising the curriculum requirements increase (Mgijima & Makalela 2016). The research also points out that, in schools that are in poor socioeconomic contexts, realising CAPs is more difficult (Bantwini 2017; Jita 2017). In this body of research, however, what becomes clear is the extent to which teachers feel constrained by the prescriptions of CAPS and experience this as seriously undermining their professional autonomy. In this regard, teachers feel they are mere implementers of the curriculum, rather than being producers of knowledge. Rather than being professionals with professional autonomy to make judgements based on their knowledge and expertise, teachers feel compromised as professionals.

Sayed et al.'s (2018) research confirms this and points out that teachers in schools that are under-resourced are not able to meet the requirements of CAPS (see also, Kanjee & Moloi 2016). The lack of resources in such school contexts reduces the possibility of utilising ICTs in teaching and learning (Bantwini 2017), and such schools are also not able to produce learners with the ICT skills to be able to effectively engage with a global economy. Thus, although teachers may be regarded as professionals, they are workers and they are employees of the state too. These structural contradictions that are materially put into place are embedded in their conditions of work, their structural location, the pressures that reduce their sense of professionalism and autonomy and demands that prescribe what the outcome of their practices ought to be. There are, at the same time, other issues that further complicate the work, positions and experience of teachers, and these relate to the kind of person the teacher is, and the learners they are expected to teach.

The identities of teachers

Race

As indicated above, South African educational history has, due to apartheid, emphasised the racial differences among teachers. Given the architecture of apartheid, which privileged whites and deprived black people based on blatant inequality and racism, white teachers have historically been given better prior training, more support and worked under more resourced conditions than

their black counterparts (Kallaway 1986; Nkomo 1990; Carrim 1997). In this regard, the race of the teacher determined the way they would experience their professional work, the conditions under which they worked and the ways in which they would have been trained and developed. Race matters.

In addition, racial incidents in schools persist to the point where many organisations outside education have argued for more to be done to erode racism in schools (for example, Nelson Mandela Foundation https://www.nelsonmandela.org and Ahmed Kathrada Foundation https://www.kathradafoundation.org/racism-watch). The racism in schools includes racism between learners, between teachers and learners, and by school governing bodies.

Gender

Like race, gender also matters. Historically, women teachers have been relegated to teach lower levels in schools, have not been readily given access to senior management positions either in schools or in educational bureaucracies, and had to contend with unequal pay for the same work. Women teachers have also tended to be given 'soft' subjects to teach and been kept away from 'hard' sciences and mathematics based on the stereotypical assumptions that men are capable of higher order thinking and rationality whilst women are viewed as less capable intellectually, and more equipped emotionally to provide care at more junior levels. Due to this, it is not coincidental that most women teachers occupy lower positions in education, teach lower grades and teach in subject areas like the arts and social sciences. This has been, and continues to be, the case in South African education (see Truscott 1993; Carrim 1997; Chisholm & September 2005).

More recently, the sexuality, ability and religious affiliation of teachers have also come under the spotlight. Propelled largely by the need to ensure that schools are anti-discriminatory spaces wherein the human rights of all are respected and upheld in inclusive ways, how teachers can ensure that this happens has indicated that how the teacher is positioned in terms of sexuality, ability and religion matters. An example of each of these should suffice to show how these identities of teachers matter, and influence how they enact their professional practices. On the one hand, these challenges are about the identities of the teachers. On the other hand, it is the multiple identities of learners in their classrooms that bring the identities of teachers into question.

Ability

In terms of ability, the tendency of most teachers seems to be to relegate learners with disabilities away from their classrooms and into marginalised areas of the school – if not to another 'special' school. Walton (2015), in tracing the development of inclusive education in South African education, notes that inclusive education, which developed to ensure that learners with disabilities get access to education, has argued for the need to mainstream such inclusive educational provisions and for teachers to recognise difference in abilities as a resource in their classrooms rather than as a hindrance. Developing differentiated teaching strategies that recognise the different levels and paces at which different learners learn, and which include learners with disabilities, provides possible pedagogical strategies that may allow more inclusive practices and

classrooms to develop.

Walton (2015) notes that part of the contributing factors to excluding learners with disabilities in schools and relegating them to distant, marginal special schools is the use of a 'deficit model' that assumes the problem is in the learners – and not in the dominant orders or practices that are used (see also Florian & Black-Hawkins 2011; Meny-Gilbert & Russel 2012). In addition, the deficit model also uses a medical model that assumes the alleged deficits learners possess are biological and medical, and thus require medical and not educational intervention. Disabled learners should, thus, rather be in hospitals or asylums or special schools and not in 'normal,' mainstream schools with other normal people.

If teachers work with deficit and medicalised assumptions of the learners they are expected to teach, then the values and orientation of the teachers, and their own sense of their normality and ability, come under question. The ability and degree of supposed normality of the teacher become important and, crucially, determine whether such teachers' classrooms uphold their own learners' human rights and the right to fair treatment and anti-discrimination. Ability matters.

Engelbrecht's (2011) research indicates that postapartheid teachers generally tend to hold exclusionary and negative views about children with disabilities, and with inclusive education. Du Toit and Forlin (2009) also note that postapartheid teachers do not seem to have an adequate understanding of the provisions of White Paper Six: Special Needs Education – Building an Inclusive Education and Training System (Department of Education 2001) and continue to view inclusive education in largely deficit terms.

Sayed et al.'s (2018) research also pointed out that working with diverse learners and developing differentiated teaching strategies to make their classrooms more inclusive is a significant challenge for teachers. Teachers feel they are not always able to enact such differentiated teaching strategies, despite wanting to.

Religion

Regarding religious affiliation, the case of Muslim girls wearing a hijab (head covering or scarf) to school caused uproar in France and across other countries in the wake of the rise of Islamophobia, and has brought the question of religious affiliation to the fore. In these cases, the religious assimilation a school puts into place by defining its ethos in mono-religious terms, and the religious affiliations and views of teachers, influence whether such educational spaces aid in cultivating a culture of human rights based on equality and respect – or whether the space becomes one in which polarisation, intolerance and maybe even violence are constructed.

In South Africa, hijab-related incidents have occurred and wearing dreadlocks and Afro hairstyles to school have also been an issue. Dreadlocks, linked to Rastafarianism, have been argued to be a right of learners and linked to a black African identity. Rejecting dreadlocks worn in schools is thus an indication of religious and race discrimination. Hair worn in Afro style, when rejected, is also experienced as undermining African identities (see Carrim 2009 for more on how hair is experienced as a mark of discrimination in South African schools). Black school learners, mainly

girl learners, report experiences of discrimination in schools by fellow learners and teachers because of their Afro hair. The values that the school promotes as its ethos, and the racial and religious affiliations and sensibilities of teachers thus influence how professional practice is enacted in context. Religion matters.

Sexual orientation

Bhana's (2014) research indicates that the dominant heterosexism in postapartheid schools continues to persist and has led to various and varying levels of discrimination experienced in schools by learners and teachers. Bhana (2014) indicates that if the teachers are homophobic and if pupils are abusive, the homosexual learner is subjected to ongoing forms of discrimination that are anti-educational. Such abused learners are marginalised, their performance levels drop (that is, if they remain in school) and they drop out of school or, even worse, try or succeed in committing suicide (see also Mac an Ghaill 1994; Woog 1995). The sexual orientation of the teacher matters.

Bhana (2014) also points out that homosexual teachers are subject to discrimination from fellow teachers and learners in postapartheid South African schools.

The preceding discussion has pointed out that teachers:

- Occupy a structurally contradictory material location.
- Vacillate between the working class and upper class.
- Are professionals and workers.
- Are raced.
- Are gendered.
- Have sexual orientations.
- Have religious and cultural sensibilities and affiliations.

Based on these points, the argument so far has been to demonstrate that teachers may be professionals, but they are more than professionals. They have multiple identities. These multiple identities are constructed by the contradictory structural position they occupy, the social categories to which they belong and their own senses of self – and the multiple identities of the learners they need to deal with in their classrooms. The discussion has also indicated that these experiences of being more than just a professional are present among postapartheid South African teachers, and that these experiences constantly inform the ways in which they enact and experience their professionalism in practice and in contexts.

Professional knowledge and practice in contexts

Kinsella and Pitman (2012), in noting the reductionist tendency in traditional conceptions of professionalism, have pointed out that rather than simply being an instrumentalist application of abstract knowledge, professional knowledge is more about working in practice – which demands practical wisdom. This practical wisdom is not an a priori abstract knowledge as suggested by Abbott (1988). Drawing on Aristotle's idea of *phronesis*, Kinsella and Pitman (2012) show that

professional knowledge is more about practical wisdom than the application of abstract, universal knowledge.

For Kemmis (2005), professional practice is more about praxis rather than a simple deductive and instrumentalist application of abstract knowledge. Kemmis views praxis as follows:

> It is action that is morally committed and oriented and informed by traditions in a field. *Praxis* is the action itself, in all its materiality and with all its effects on and consequences for the cultural-discursive, material-economic and social-political dimensions of our world in its being and becoming. (2005: 150)

Notions of phronesis, practical wisdom and praxis offer conceptions of professional practice that are not mere applications of abstract knowledge upon which judgements are made. They offer views that work with theory, practice and contexts and the dynamism of material conditions, and are more helpful than traditional views of professional knowledge.

The experiences of postapartheid teachers discussed above indicate that developing forms of phronesis, practical wisdom and praxis are more useful in capturing the experiences of teachers as professionals than constantly emphasising the abstract knowledge and deductive use of such abstract knowledge by professionals. Postapartheid teachers seem to need ways to navigate through their contexts and positioning, and to be enabled to make judgements within such material conditions. They need, in other words, ways of developing practical wisdom in addition to, if not more than, abstract knowledge.

Professionalism in a postcolonial context

As indicated above, among the challenges currently facing postapartheid South African teachers are the demands for the construction of a postcolonial order. This call for a postcolonial order operates on various levels. In relation to the issues raised in this article, three aspects of this call will be focused upon: epistemological frameworks, the identity of the professional, and working with multi-layered approaches to professionalism that recognise contexts and people within them.

Postcolonialism and epistemological frameworks

The central argument epistemologically about the need to construct a postcolonial order is related to the claim that dominant epistemological frameworks are Western and European in form. They also privilege white, heterosexist, male and ableist *regimes of rationality* (Foucault 1970), which are at the same time largely Christian. The subjugation and *misrecognition* (Taylor 1994) of black, female, homosexual, disabled, colonised, and non-Christian, inter alia, worldviews, are argued to constitute grave *cognitive injustice* (Visvanathan 2001), and are viewed as linked to forms of colonial domination (see also Bhaba 1994).

When used in education, such epistemological frameworks are filtered through the curriculum that is taught, the behaviour that is regarded as appropriate and the basis upon which assessments are conducted. For learners who do not subscribe to such dominant worldviews, the result is that they

are denied epistemological access and experience *symbolic violence* (Bourdieu 1976). This was noted in the above discussion about the ways in which those who are not part of the dominant white orders assumed in schools and who wear Afro hairstyles, and those who not are not abled or are not heterosexist, continue to experience discrimination in postapartheid schools. Those who belong to the dominant order are given easier access to such dominant orders because the dominant orders are in their image and relate to their experiences. The colonised other who may be black, non-Christian and female, for example, are rendered misrecognised, not 'in the picture' and inferiorised.

The #RhodesMustFall campaign by students of the University of Cape Town, and which linked with the #FeesMustFall campaign that spread across all universities in South Africa in 2015/2016 visibly and publicly indicated the demand that colonial orders and frameworks cannot be allowed to continue in the wake of the need to construct a postcolonial order (in South Africa). The #RhodesMustFall campaign was about the removal of the statue of Cecil John Rhodes, a coloniser, and whose statue was centrally and prominently displayed on the campus of the University of Cape Town. Calling for the removal of the Rhodes statue was a call for recognising the worldviews of the colonised, which have been systematically eroded under colonialism, and the need to revisit and resuscitate alternative and different ways of viewing the world. The #FeesMustFall campaign was about making university education accessible to qualifying students who do not have the financial means to access it.

For professionals like teachers, this has meant whether or not the teacher promotes colonial views matters. Where teachers uphold and promote colonial content, ideologies and epistemologies are directly called into question by learners in classrooms or lecture halls who simply ask: 'Where are the African, and views of the colonised?' or 'Why are there only Western, European authors used in this subject or course?' Implicit in these challenges is the calling into question whether dominant European and Western worldviews can be regarded as truth. In other words, their epistemological claims to validity and truth are explicitly being questioned. Thus, on one hand, teachers are made to deal with calls for postcolonial knowledge by their learners and, on the other hand, it calls into question what kind of epistemological framework is used in framing the curriculum they teach. Soudien's analysis of 'home language' and 'history' texts used in the current curriculum in schools notes that the postapartheid curriculum continues to promote what he describes as 'the domination of the western canon' (2007: 138).

Postcolonialism and professional identity

At the same time, what epistemological frameworks and assumptions are used in the construction of the professional cannot be assumed and taken for granted. Several recent theoretical contributions have pointed out that higher education in postapartheid South Africa continues to be framed in, and reproduce, Western and European epistemologies. Such dominant epistemological frameworks also inform teacher education programmes given that teacher education is a responsibility of higher education institutions in South Africa. The need to decolonise education and knowledge taught, and to develop postcolonial knowledge, includes the kind of knowledge

and epistemological frameworks taken for granted in professional training programmes too.

This challenge of decolonising knowledge and developing postcolonial knowledge systems is currently echoing through the corridors of all universities. The call to decolonise education is increasingly coming into the limelight in education conferences and journals (see, for example, SAERA 2016; *Journal of Education* 2017). A special issue of the journal, *Educational Research for Social Change*, provides useful accounts of the way in which the decolonisation call is impacting education in postapartheid South Africa. Fataar (2018: iv), in the editorial of that special issue, writes:

> The politics of knowledge in South African universities has recently witnessed a radical discursive rupture. The call for decolonising education was a cornerstone of students' recognition struggles at universities. Mobilising on the basis of their demand for free education, students across the university sector expressed the need for change in university knowledge and curricula in the light of what they described as their exposure to Eurocentric, racist, and sexist knowledge at untransformed institutions. They argued that such a knowledge orientation is at the heart of their experience of alienation at the university. They suggested that only the complete overhaul of the curriculum on the basis of a decolonising education approach would provide them the type of educational access that addresses their emerging African-centred humanness.

Given the epistemological and ideological challenges confronting the postapartheid South African educational system, teachers are unable to ignore the way these challenges impact their practices and their sense of self.

Postcolonialism and professionalism

The above challenges emerge from the call for establishing a postcolonial order. However, these challenges are also about current times. As Jensen et al. (2012: 2) note:

> Today, however, the basis for professional work is challenged in many ways. In the context of cultural and institutional shifts, the certainties and assumptions that were constitutive for social life throughout most of the last century, it is maintained, have lost their integrative power.

In this light, the postcolonial order is about more than meeting the calls of the colonised other. It is about the challenges of the 'certainties' of the last century. In Bhaba's (1994) terms, it is about a *third space* – a space that reconfigures epistemological orders away from the dualisms of Western and European colonial conceptions and polarised forms of domination and subordination. It is also about being in a digital age where there is 'an extensive distribution of knowledge and information that is open to all without necessarily having gained the endorsement of professional or institutional authorities' and wherein 'professional jurisdiction comes under challenge' (Jensen et al. 2012: 2). The professional in this context is not simply one who has abstract knowledge upon which to deductively draw in order to make judgements.

In order to deal with such challenges of establishing a postcolonial framework, broadly conceived, and as including the digital age, it seems that non-reductionist and non-polarised approaches are becoming urgent. Professionals cannot simply be treated as if they are not at the same time

representations of ideological forms and orders. Professional knowledge cannot be treated as if it is only abstract and does not need to consider the people with whom it is practised – nor the conditions under which it is enacted. Professionalism also cannot be assumed to imply that European and Western colonial views are necessarily valid, nor can they be assumed necessarily true. Professionals also cannot assume that they can be easily separated from others in society simply on the basis of their being professionals. Their identities and their humanity, as with others in society, cannot just be abstracted as if they do not directly inform their professional practice.

A multilayered and non-reductionist approach may enable a more expanded or broadened view of professionalism, professional knowledge and practice to be put into place. Such a multilayered view would allow for recognition of the structural contradictory position of teachers as professionals, for example, to be considered. It would also allow for a recognition of bringing together professional knowledge and the contexts and conditions in which they are expected to be practised. And it would allow for alternative ways of viewing professionalism that would deal with the plurality and multiplicity (see Hall et al. 1992, for example) that seem to be characterising the current global knowledge economy. Such a multilayered approach might also reduce the polarisation of professionals from other people in society by recognising that professionals share experiences and identities with others. And, more importantly, such a multilayered approach would enable assumptions that professionalism can only be defined in Western and European terms to be questioned critically.

Current times are complex times, and doing business the old way seems not to be a viable assumption to make. The need to broaden our understanding of professionalism is becoming urgent if professions are to sustain themselves in the current global order. The postapartheid experiences of South African teachers as professionals indicate that such considerations cannot be delayed. Shifts in paradigmatic orientations are necessary to allow professionalism to be viewed and experienced in non-reductionist and non-polarised ways so that professions can be based in time and space and among the people they are expected to be servicing.

Conclusion

This article has argued for the need to broaden assumptions about what constitutes professionalism, professional knowledge and practice. It has been argued that abstract, polarised accounts of professionalism are counter-factual and ahistorical. Using postapartheid teachers as an example of professionals, the article has shown that the contexts and identities of teachers matter significantly, and frame teachers' professional practices and senses of self. It has also been demonstrated that teachers are currently also dealing with the need to consider what their professions and professional practices could mean in a postcolonial order, and what should be used in defining these within current complex conditions.

Central to the article has been the argument that, whilst teachers are professionals, they are more than that. From being in structurally contradictory material positions, the multiple identities they possess, to the challenges they face in specific contexts and conditions, postapartheid teachers

have been shown to be dealing with challenges with which abstract and decontextualised accounts of professionalism do not help. The article has, therefore, argued for a more multi-layered approach to professionalism to be considered. Such an approach would enable a move away from abstract, reductionist, decontextualised and polarised thinking, and allow professionalism to relate to the complex conditions and demands of postcolonialism that is increasingly characterising current times. It has also been argued that such shifts in approaches to what constitutes professionalism are becoming urgent and are crucial for professions to sustain themselves in current times and the immediate future.

It has also been suggested that developing practical wisdom that will allow professionals to deal with the challenges they face may be useful as well. In this regard, initial teacher education and continuing professional development programmes need to pay specific attention to enabling teachers to develop practical wisdom and to equip them to understand possible ways in which they could navigate the complex conditions that confront professionals when in practice.

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Identities in transition: Professional identity construction by student teachers in England and South Africa at the end of their university-based training

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Abstract

Teachers' sense of professional identity and their application of professional judgement are closely related. This comparative study considers factors influencing the professional identity development of student teachers in two universities, one in South Africa and one in England, with implications for the impact on the nature of the professional judgements they are likely to make. Using a qualitative approach, semi-structured group interviews were conducted with final year undergraduate student teachers in each university who had volunteered to participate. Two groups of five or six participants were interviewed in each setting. Interviews were transcribed and analysed manually, using a data-driven approach (Gibbs 2007). The findings suggest some similarities in the pedagogical beliefs of the student teachers in both countries; however, their emerging professional identities were constructed very differently. The study draws on positioning theory (Davies & Harre 1990) and the work of Gee (2001) to suggest that transitional professional identities were being constructed through processes of affiliation in England, and negative positioning in South Africa. In both cases, it is suggested that these are limited perspectives that may reduce opportunities for professional growth and the operation of professional judgement. Implications are identified for teacher education programmes in both countries.

Keywords: professional identity, positioning theory, comparative education

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Introduction

It might be expected that teacher education students have developed a sense of the kind of teacher they want to be, and are able to make professional judgments by the end of their university teacher education programmes. This expectation is influenced by the assumption that in their theoretical training, but more specifically during their practical experience in schools, their beliefs and values about education and their role in it have been developed (Sachs 2001). Given that professional judgement is based on gained knowledge and skills, but also embedded in personal values and moral judgements (Coldron & Smith 1999), professional identity and the capacity for professional judgement are inextricably linked. However, international research indicates that the development of a newly acquired professional identity can prove challenging for some student teachers – which can continue into their early years of teaching (Gravett, Henning & Eiselen 2011; Henning & Gravett 2011; Pillen, den Brok & Beijaard 2013; Hong, Green & Lowery 2017). It is therefore important for teacher educators, and those supporting new teachers in their first posts, to consider ways of reducing the tensions and difficulties experienced by some early career teachers.

This comparative study discusses responses of final year undergraduate student teachers from South Africa and England in group interview settings. These two contexts, a 'developed' education system and a 'developing' system, offered an opportunity for the researchers to examine student teachers' experience in their own country alongside that in another and, in so doing, to reevaluate aspects of teacher education practice in both countries.

The interviews focussed on discussion of student teachers' practice and experiences on their final teaching placements, as one factor in the development of their identities as future teachers. While we acknowledge the wide range of possible influences on professional identity development in addition to experience in placement schools (Izadinia 2013), the responses of the two groups of student teachers indicate the impact of this experience on their conceptions of the kind of teacher they want to be and, thus, on the nature of the professional judgements they were likely to make. The interview responses were examined through the lens of positioning theory (Davies & Harre 1990) to identify the ways in which the student teachers' experiences in schools had influenced these conceptions.

This research is of interest to teacher educators generally, including those in England and South Africa. It raises issues for consideration in teacher education programmes in relation to the interface between universities and placement schools, and in terms of the role of teacher educators in preparing student teachers for the complexity of their future lives in schools and classrooms.

In the remainder of this article, we outline some key findings from recent research into professional identity development in novice teachers, and then show how positioning theory can be a helpful mechanism for exploring how individuals construct their identities through talk. We then consider the respective contexts of both groups of student teachers as prospective sites for the development of professional identity and professional judgement before outlining the research study and its outcomes.

Teacher identity development

The literature on teachers' professional identity offers a range of research approaches and theoretical frameworks (Beauchamp & Thomas 2009). Despite this, there are areas of general agreement. Teacher identity is regarded as dynamic – shifting over time in response to external and contextual factors (Day et al. 2006; Flores & Day 2006; Mockler 2011), as well as to internal factors such as prior constructs of the self and of emotions (Hargreaves 1998; Zembylas 2003; O'Connor 2008). The influences of external and contextual factors such as changing educational policies, individual school cultures and relationships with colleagues contribute to the stability or otherwise of teachers' professional identities (Maclure 1993; Day et al. 2006). Gee (2001) and Beijaard, Meijer and Verloop (2004) consider identity to be both person and context, constructed from how persons see themselves, and how they are perceived by others.

Research focusing on preservice teachers' emerging professional identities during the period of training has noted the tensions experienced by preservice teachers between their ideal or preferred teaching self and that which seems to be required in the 'real' context of the classroom (Smagorinsky et al. 2004; Barnes 2008; Pillen et al. 2013). These include conflict between the desired and actual support given to learners, conflicting conceptions of learning to teach, and between being a member of the school community and being an outsider (Pillen et al. 2013; Kayi-Adar 2015).

In addition to their personal and educational biographies, preservice teachers are particularly vulnerable to the contextual influences of the schools where they undertake their teaching placements, and in their relationships with supervising teachers. Accounts of preservice teachers who experience conflict between their own views of teaching and those of their placement mentor are presented by Pillen et al. (2013), Smagorinsky et al. (2004) and Kayi-Adar (2015). In these cases, the preservice teachers' sense of personal professional identity felt compromised by the expectations of the mentor and the power relationships involved because they were dependent on positive reports from the mentors to complete their university course satisfactorily.

While some researchers have argued that experiencing tensions leads to a stronger sense of identity and agency (for example, Smagorinsky et al. 2004), others, such as Kayi-Adar (2015), suggest that experiencing tensions during teaching placements can constrain professional development. This, in turn, could limit novice teachers' ability to make appropriate professional judgements.

Positioning theory and identity

Positioning theory suggests that individuals construct identities through discursive practice in social situations (Davies & Harre 1990). These identities are not inherent in the individual, but are subject to revision according to context. Speakers both position themselves and position others through talk, and have agency in terms of the choices they make between various possible positions. Research with Norwegian primary school teachers (Søreide 2006) shows how teachers

constructed possible teacher identities during interviews in which they were asked to talk about their jobs as teachers. Søreide (2006) argues that an identity position emerges where several positions make a cluster within a discourse. Kayi-Adar (2015) explored the ways in which three preservice English language teachers positioned themselves in relation to the learners in their classrooms and the mentor teachers in their placement schools. As with the preservice teachers studied by Smagorinsky et al. (2004) and Pillen et al. (2013), they experienced tensions by holding conflicting positional identities throughout the period of their school placements (Kayi-Adar 2015).

Both Søreide (2006) and Kayi-Adar (2015) found that identity positions were created through positive and negative positioning. Participants aligned themselves with behaviours and attitudes that reflected the kind of teacher identity they wished to present, and distanced themselves from those that contradicted the chosen identity position. These positions were sometimes expressly articulated but, at other times, they emerged by implication in the ways participants described the behaviours of other teachers (Søreide 2006; Kayi-Adar 2015). Søreide argues that the identity positions constructed by the participants in these studies were drawn from a 'stock of narrative resources' about teaching (2006: 529). It can be suggested that individuals have agency insofar as they select or reject positions from this shared stock, but they are also limited by the choices available within the culturally constructed narratives available: those that Sfard and Prusak (2005: 18) refer to as 'designated identities.'

For preservice teachers, such designated identities may be more restricted. Lanas and Keltchermans (2015: 22) argue that, while the conception of professional identity held by preservice teachers is 'overpopulated with competing contents' the concept of *teacher* may be limited by normative ideas, and only some constructions are perceived as legitimate. This is exemplified by a group of new teachers in England, interviewed by Wilkins (2011). These teachers appeared satisfied with the 'micro-autonomy' they experienced in their primary school classrooms, recognising, and apparently accepting, the pressures of strongly performative school cultures (Wilkins 2011: 404).

The development of individual professional identity is situated and complex, located at a social-cultural/personal/experiential intersection, and inherently unstable. The main focus of this study was to examine and compare the identity positions presented by the final year undergraduates from England and South Africa in relation to their experiences in schools. Drawing on the research outlined above, we aimed to examine these positions in relation to the student teachers' respective contexts and the narrative resources available to them at the transition point between leaving the university and taking up their first teaching posts. These positions could, in turn, influence the basis for professional judgements made by these teachers as they began their careers.

Research contexts of the student teachers

The educational contexts of the two groups of student teachers obviously impacted on their understanding of professional identity and their opportunities for the exercise of professional judgement. While there are significant differences in terms of class size and availability of resources between the two countries, national policies were also very influential.

In both cases, the student teachers' early school experiences were influenced by national policy changes, but these were very different in terms of their underlying intentions. The South African participants' school experience as learners was influenced by the first postapartheid curriculum: Curriculum 2005 and its subsequent revisions. These all promoted curriculum integration and an outcomes-based education (OBE) approach centred on eight learning areas, rather than 'subjects' (Chisholm 2005). This pedagogical approach was intended to be strongly learner-centred. In contrast, the English student teachers were recipients of major interventions into the school curriculum that emphasised a knowledge-centred, rather than learner-centred, approach. The impact of the National Literacy and Numeracy Strategies (Department for Education and Employment 1998, 1999) and national testing for all primary pupils in English, mathematics and science generally had the effect of narrowing the curriculum (Wyse & Torrance 2009).

By the time the South African student teachers entered their university course, it was acknowledged that the OBE curriculum had largely failed. The current Curriculum Assessment Policy Statements (CAPS, Department of Basic Education 2011) then in place emphasises subject content reinforced by regular testing (Nel 2018). This policy was implemented after the participants of this study had completed their schooling, and forms the curriculum they are expected to teach in their school placements. For the English student teachers, there was less curriculum change. Inspections by the Office for Standards in Education (2014) with powers to penalise and even close those schools deemed to be 'underperforming' contributed to an increasing conformity of practice in schools, with a view of 'effective teaching' largely defined through government policies reinforced by the process of school inspections. By the time the student teachers in the research study undertook school placements, they met a well-established performative culture (Ball 2003) in which schools monitor the performance targets of all children against national standards, and where teachers are responsible for ensuring appropriate progress towards the targets set.

In both countries, schools are expected to take responsibility for supporting student teachers' development through the process of mentoring. This form of training is very well established in England, having been introduced through government policy for Primary Initial Teacher Education in 1993 (Department of Education 1993). Student teachers on a university-based undergraduate programme undertake placements in partnership schools where a mentor teacher observes their work in the classroom and provides advice and support throughout the placement period. The mentor is mainly responsible for assessment of student teachers' progress, using the English Standards for Qualified Teacher Status (Department for Education 2011). School mentors are normally experienced teachers who have received training for their role.

In South Africa, the fundamental prerequisites and number of practical weeks are prescribed by the Revised Policy on the Minimum Requirements for Teacher Education Qualifications (Department of Higher Education and Training 2015), but each university has its own curriculum, logistical and assessment requirements. In the instance of this South African university, students organise their own placements and in-service teachers are appointed by the schools to supposedly act as mentors. Yet, based on the large number of student teachers in schools during practical weeks, and mentor teachers generally not being adequately trained as mentors nor monitored, this aspect is generally recognised as requiring attention by teacher education programmes (Mukeredzi & Mandrona 2013; Mukeredzi, Mthiyane & Bertram 2015; Smit & du Toit 2016). This can result in a disjuncture between the experiences of student teachers in the university, and the expectations of schools where they arrange their teaching placements (Gravett et al. 2011; Henning & Gravett 2011).

In these two contexts, opportunities for student teachers to implement independent professional judgements are limited. As student teachers, they are expected to work under the guidance of their mentors and are dependent on the mentors for a positive report. In England, this may mean that mentors actively support student teachers to conform to the prevailing culture of performativity while, in South Africa, it would appear that student teachers are also expected to implement a subject-based curriculum with its attendant testing but, often, without discussion or guidance from their mentors.

The research participants

The universities in England and South Africa where the study was undertaken both have large faculties of education providing teacher training for primary and secondary education at undergraduate and postgraduate levels. The student teachers involved in the group interviews in both universities were volunteers drawn from those studying in their final year of undergraduate teacher education programmes for primary teachers. These were convenience samples. No attempt was made to control group membership in terms of gender, age or ethnicity although, in both universities, the groups reflected the broad gender balance of the respective teacher education programmes – that is, women participants constituted the majority of the group memberships.

All had completed their final school placements before participating in the research, to avoid any ethical conflicts. They were aware that ethical permission had been granted for the research, and were aware of the confidentiality issues pertaining to participation in group interviews with respect to other participants.

The interviewers were both teacher educators known to the student teachers in their respective universities, but had not been involved in the school supervision of any of the students and were not directly involved in the assessment of their course work at the time of the interviews. While this could not eliminate power imbalances between the interviewers and group members, the participants were aware that their participation could not affect their final degree results, either

positively or negatively. However, it is possible that the students who expressed an interest in participating in the research did so on the basis of their preexisting relationships with the interviewers, which may have enabled them to feel more confident in sharing their experiences.

Research method

An interpretive approach was adopted to focus on the perceptions and feelings of the participants, and the meanings they ascribed to their experiences. In terms of design, the study corresponds to Merriam's category of 'basic qualitative study' (2009: 22), that is, it did not draw on any specific theoretical framework, but utilised a qualitative research method and approach to data analysis.

Semi-structured group interviews were identified as the most suitable method for three reasons. They can assist with recall and elaboration of ideas, given that participants respond to each other as well as to the interviewer (Frey & Fontana 1991; Flick 2009; Brinkmann & Kvale 2015). In the case of this study, this could also reduce any vulnerability students might feel in engaging in a one-to-one interview with a university tutor. Group interviews also present advantages in terms of increasing the amount and range of data collected within a time frame (Robson & McCartan 2016). This was an important consideration, given our interest in the transitional position of the student teachers in the final few weeks of their university programme. A semi-structured approach to the interviews was adopted to enable the comparison of responses in key areas both within and between countries, while allowing for flexibility so that participants could elaborate in their local contexts.

Group sizes were similar in both countries and the interviews were audio taped and transcribed, verbatim, for analysis. On average, the interviews lasted about 45 minutes. Groups of five or six were chosen to ensure full participation from group members, while still seeking a range of responses to the questions. A total of 12 participants were interviewed in South Africa, and 11 in England.

The interview questions were designed to elicit the student teachers' perspectives on being a 'good teacher' and their emerging sense of professional identity. The questions covered key aspects of classroom practice recognised as appropriate in both national contexts, and couched in terms of the participants' experience in school on their final placement – including their relationships with their mentor teachers. Initial responses to the questions were spontaneous and not elicited from specific individuals, but both researchers sometimes asked individual students for their views once an initial response had been obtained to ensure that all group members had opportunities to contribute. Students also responded directly to each others' points at times, without the intervention of the researcher.

The responses from all four group interviews were analysed manually, initially on a question-by-question basis. The process of analysis followed the 6-stage model of Braun and Clarke (2006: 86). The coding process was primarily 'data driven' (Braun & Clarke 2006: 88; Gibbs 2007: 44). Descriptive codes related to behaviours described by the student teachers, such as

the ways they planned lessons or sought to engage learners, were further analysed to produce 'analytic codes' (Gibbs 2007: 43). Both researchers had access to the transcripts of all group interviews, and analysis was undertaken iteratively through online and face-to-face discussion to increase reliability.

This enabled us to undertake comparisons between the responses of the student teachers in the two countries. For example, the analytic codes, 'getting to know your learners' and 'adapting teaching to meet learners' ability,' were common to student teachers in both countries, although differently explained, whereas 'availability of resources' emerged only in responses from South African participants. Other analytic codes common to both countries included 'professional learning,' 'emotional engagement with school' and 'emotional engagement with learners.' Inconsistencies in the responses of some participants were also noted, so that patterns within some analytic codes were not entirely consistent. This is to be expected (Braun & Clarke 2006: 89) and these minority positions are recognised in the following discussion.

Discussion of the results has been organised under three main headings, incorporating several analytic codes (Phase 5 in the 6-stage model of Braun & Clarke 2006: 92). These are student teachers' pedagogical beliefs, the idea of the good teacher, and integration into the school. The ways in which student teachers in both countries positioned themselves in relation to these themes provided an insight into the identity positions that were constructed at the end of their formal training, and suggest the basis on which their professional judgements might be implemented.

Student teachers' pedagogical beliefs

Although the student teachers in South Africa were working under very different conditions from their peers in England, attitudes towards school students and the underpinning principles of learner-centred pedagogy were similar in both countries. Both groups of student teachers positioned themselves as teachers who cared about the learners in their classrooms. They wanted to cater for learners' needs and to create a positive classroom environment:

> It is very difficult to understand every learner, because in South Africa, we have big classes, 50 learners and one teacher, so it is impossible that you will be able to learn every learner but I think you can maybe adjust your approaches and teaching strategies. First, you get to know your learners and then you have general perception what are their strength and weakness and then you take it from there. (South Africa, SA, Group 1)

> You have to get to know the class to make sure you get the differentiation right. (English Group 1)

Both groups of student teachers valued the use of different teaching strategies (for example, group work, educational games, using learning tasks outside the textbook). However, the South African student teachers found it more difficult to implement these, partly because of class size and resourcing, but also because of curriculum pressures and the need to prepare for regular testing. Both groups regarded these strategies as important to increase motivation and to support learners' understanding. English student teachers also referred to increasing learners' 'ownership of their

own learning' and of developing a 'can-do attitude.'

While the student teachers in both countries placed an emphasis on 'making a difference' to individual children, the language and examples used were very different. In England, this was seen mainly in terms of the 'engagement' of children in learning, or of having a 'buzzy' classroom atmosphere. The South African student teachers noted the impact of their teaching as making a difference to children's learning, but were more likely to comment on interpersonal relationships with learners:

> When they come and open up to me, and I'm able to make a difference, even like give them motivational words, then it makes a difference in my life and in their lives. (SA Group 2)

In both countries, the student teachers were expected to follow the school requirements for curriculum content and assessment. Some students commented on the restrictions they experienced in how they were expected to teach, but this did not extend to comments on the actual content of the curriculum in either country. This was experienced as a given. In South Africa, the restrictions related to the requirement to move through the textbook at a given pace, regardless of whether all learners had understood the subject matter:

> OK, you couldn't finish addressing their needs, the curriculum says now you have to go on to the next class [i.e., next section in textbook]. (SA Group 2)

The classroom practice of English student teachers was not restricted by a textbook in the same way, but some schools insisted that they adhered to prescribed lesson plans:

> My school is quite strict: OK, these are the lessons for the week, this is how they have to be carried out. (English Group 2)

With this exception, the English student teachers appeared to have greater freedom as to how the curriculum content would be taught but, at the same time, this was associated with ongoing monitoring of pupil progress towards targets set against national expectations for achievement:

> They had an assessment grid with statements of what they needed to achieve ... the mentor would highlight the ones she wanted you to cover that week and then how you went about it was your choice. (English Group 2)

In both countries, the student teachers were attempting to balance their commitment to accommodating the needs of learners with that of the curriculum coverage required by educational policy, as mediated by the schools in which they were placed. Despite the significant differences of context, the pedagogical values and principles expressed by members of the two groups were fundamentally similar.

Qualities of a 'good teacher'

It is thus not surprising that the student teachers from both countries held many similar views about the qualities needed by a good teacher, in addition to the learner-centred position noted above. Maintaining a positive attitude, being flexible and resilient, and being committed to teaching were

mentioned by both groups:

> I think positivity. One part of education that frustrates me is how negative everyone is – I just think it would be a nicer place to work if everyone was ... Everyone must love it still to do it. I don't believe you can be a teacher without loving it. And so, don't be negative about it. It just frustrates me so much if people are negative. (English Group 2)

> Patience, dedication is very important because if you are not dedicated, if you did want to be here and if you don't want to do it and you just doing it because I'm getting a pay check it is not going to work. You have to be dedicated. You have to breathe teaching, eat teaching and sleep teaching. (SA Group 2)

Both groups also referred to concepts of caring, nurturing and being sensitive to children's home backgrounds as fundamental to good teaching:

> Uhm, you are dealing with human beings and they come from different families and there is all sorts of problems, ma'am, and so it is important to put yourself in their children's shoes. (SA Group 2)

> I think as well, maybe nurturing – that real fostering of ... it's OK to make mistakes. Kind-of cultivating that really safe environment and kind of nurturing. (English Group 1)

For the South African student teachers, respect was regarded as an essential aspect of caring. The word 'respect' was used several times by student teachers in both South African groups as an important, shared value in classrooms and schools – although they implied that this was not always present:

> You have to show your learners that you care about them, that you are there because you want to be, not because you are forced to be there. And as she said respect, respect is the most important aspect in a classroom, because if you respect your learners they will return a favour back. (SA Group 2)

Other emotional qualities were also seen as being important but, here, some of the emphases were different. For the English student teachers, the key words were 'fun,' 'engaging,' 'enthusiasm,' 'passionate.' Being enthusiastic and passionate were mentioned most frequently. The South African student teachers focused more on 'patience' and 'respect' as in the example above.

Integration into the school

The most significant differences between responses in the group interviews in South Africa and England arose in response to questions about support for their professional development as intending teachers, and to their integration into the school during their placement experience. There was a marked difference in the tone and language used by the two groups when referring to schools and individual teachers.

The student teachers in England often referred to 'my school,' 'my class' or 'my teacher' in the discussions, where the use of the possessive pronoun clearly indicated a positive relationship. In discussing aspects of classroom practice, the first-person plural 'we' was used to designate shared practice with the class teacher:

> We used mixed ability partners quite a lot, and taught in that way, so they were learning partners and they would support each other. (English Group 2)

In contrast, several of the South African participants were openly critical of both schools and teachers, and mainly used impersonal language or the third-person 'they' that signalled a sense of distance. For example, lack of resources seemed to be characterised as a lack of willingness on the part of schools rather than being attributable to insufficient finances:

> Use the pictures, use internet, use videos – all those things are very necessary in a school and schools *don't even* invest in them. (SA Group 2)

Teachers were regarded as being unwilling to make necessary adjustments to their teaching:

> Teachers only do what they have to do; everything extra is a headache. (SA Group 1)

or, as not having sufficient knowledge to make suitable adjustments:

> Most of the time the teachers just go in with a textbook, they start teaching, they give children activities straight from the textbook as if there are no worksheets or, maybe, I don't know if people are [pause] lazy to go on the internet or don't know how to use technology. (SA Group 2)

While the student groups were willing to acknowledge the lack of training for many South African teachers in order to support the full range of learner needs in classrooms, they were also critical of some of the unsympathetic attitudes they observed in the classroom:

> It is important to put yourself in their children's shoes – you know, be sensitive towards them, respect them … instead of shouting at them 'cause you know they are children. (SA Group 2)

It was evident that the South African students had not enjoyed positive personal relationships with teachers to the same extent as their English peers. This may have been partly as a result of the different school organisation that meant they worked with several different teachers rather than a single class teacher as in the English primary system, but their accounts seemed to indicate that – in some schools at least – there was little investment in their development as intending teachers:

> I think the university does mention this, that they should involve us as much as possible in teaching and learning in interaction and activities but I mean some of the teachers treat us ... they send us to do photocopying ... that is all I did and, I mean ... It does not benefit us in any way… Like, if a teacher say do this, we do it, we don't ask questions … and now we think if we don't say yes, we are going to get a bad report. (SA Group 1)

Although there were acknowledgements that some teachers were helpful, the South African student teachers stated that they generally received little support or advice to help them develop their practice, whereas the mentors in the English schools appeared to have provided support and encouragement as well as the space for the student teachers to feel some ownership of the classroom:

> And this year, with the more autonomy that you've got – which is great – it's knowing that your class teacher or your mentor are going: 'We know you're capable, have a go' and kind of passing it over to you, but knowing that if you think 'Ooh, not sure,' you have those people to go to. (English Group 2)

Constructing identity positions

Despite the similar views expressed by both South African and English student teachers in respect of their pedagogical beliefs and many of their ideas of a good teacher, these views were emerging and being reinforced in very different ways. For the English groups, the main mode of professional identity construction appeared to be that of affiliation (Gee 2001). In most cases, the student teachers appeared to adopt the institutional identity of the classroom teacher presented to them by their placement schools in an unquestioning manner. This is reminiscent of the student teachers in Barnes' research who also used first person pronouns to designate themselves as 'real' teachers (2008: 9), but it may also indicate the restricted forms of 'designated identity' (Sfard & Prusak 2005: 18) available to them within the highly regulated context of English schools.

They discussed their classroom practice using a shared terminology ('differentiation,' 'formative assessment,' 'engagement') that was embedded in government policy and reinforced through the process of school inspection in England. This terminology was also reinforced in their university courses, again influenced by the inspection process referred to earlier. These responses were underpinned by the notion of 'progress' and the need to ensure that all learners achieved the targets set. Given the strongly performative culture permeating English primary schools, it would be very difficult for student teachers to be regarded as successful if they did not conform to these expectations (Wilkins 2011). However, it appears that these English student teachers had absorbed the prevailing culture of accountability as a normal part of their professional values and expectations. Professional judgement was therefore linked to ensuring that appropriate progress was being made by each learner. At the same time, the English student teachers also emphasised the importance of learning as fun, alongside the importance of the teacher being passionate and enthusiastic. There was no indication that these student teachers felt any discrepancy between these qualities, the emphasis on performance targets, and the different forms of professional judgement required.

There was little evidence of the tensions experienced by novice teachers described in the work of Pillen et al. (2013) among the English student teachers, except in the case of one student who felt constrained by the requirements of the school's centralised planning. The English student teachers valued the sense of autonomy they had experienced during their final placements, and talked about having ownership of the classroom in relation to aspects of planning and teaching strategies. At this stage of their professional development, this very limited form of agency appeared to be the extent of their professional aspiration. In this way, their views resembled those of the new teachers in Wilkins' research, who were also satisfied with the 'micro-autonomy' of the classroom (2011: 404). The narrative resources on which they drew thus appeared to be defined by current policy and practice in schools, perhaps reinforced by their university courses, due to the partnership model of training described earlier.

In contrast, South African student teachers frequently distanced themselves from the practices they described in schools, taking oppositional positions to these teacher attitudes and behaviours. They established their own professional identities through this process of negative positioning, similar

to that used by some of the teachers in the research by Søreide (2006). This process generally took the form of describing their own behaviours as being consciously different to that of other class teachers in their placement schools. While it is not possible for this research to confirm the extent to which comments about some schools and class teachers were justified, there was consistency between the two interview groups in terms of these observations.

Additionally, and in strong contrast to the English student teachers, the ways in which they referred to teachers in schools was consistently in the third person. The students usually spoke generically of 'the teachers,' as in the quotations above, or used the pronoun 'they,' thus disengaging themselves from the teacher identities they described and positioning themselves through a process of othering or negative positioning. The idea of respect, which emerges strongly in the group interviews with the South African student teachers, emphasises the cultural-historical context of education in South Africa and seems to be influential in constructing the oppositional identities demonstrated by these student teachers. This learner-centred perspective sits in contrast to the knowledge-centred perspective that is current policy in South Africa (Department of Basic Education 2011), and formed an important narrative resource for these student teachers.

Gee (2001: 100-107) proposes four ways to view identity: as a natural state, as an institutional position, as recognised through the discourse of others, and as being a member of an affinity group. We suggest that the English student teachers constructed their identities at the end of their university programme on the basis of affinity with the practices they had engaged with in schools, whereas the South Africa student teachers largely constructed their identities at this stage through rejecting such affinity. Gee's (2001) category of discourse identity was also evident in the student teachers' accounts – from both countries. English student teachers had clearly been treated as members of the school community. They had been given some ownership of the classrooms in which they were placed and had been sufficiently integrated into the practices of their schools to use the first-person plural 'we' as part of their own discourse. Although they did not provide explicit examples, this could not have been the case without the use of language that positioned them as insiders in the teacher community. Given the desire of student teachers, generally, to be perceived as 'real' teachers (Barnes 2008), this was likely to reinforce their sense of affiliation and their lack of questioning of accepted practice. As we have seen, the South African students were sometimes constructed as outsiders by the teachers in their placement schools and expected to carry out administrative tasks rather than spending time in the classroom. As the student teachers were dependent on good reports from their schools, these power imbalances were likely to exacerbate existing tensions related to different perspectives on classroom practice.

Implications for teacher education programmes: Too close in, or too far away?

While this research study focuses on the influence of school placements on identity construction and its potential influence on professional judgement, the role of the university programmes and influence of teacher educators should not be ignored.

In her review of research on student teachers' professional identity Izadinia (2013) identifies four

main categories that are argued to have an impact on identity formation. While student teachers' experiences prior to entering teacher training and the school context were seen to be influential, as indicated above, other studies focused on the importance of reflective activities during the university programme, and on the importance of being part of a learning community. Teacher educators have a significant role in facilitating student teachers' engagement in the two latter areas but this is not a straightforward process. For example, the contexts within which reflective activities take place may not always foster critical examination of practice and discussion of the complexities affecting professional judgements.

It is important to acknowledge the possible influence of curriculum design and content, and the attitudes of university lecturers, in influencing student teachers' perspectives. The partnership model operating in England may have resulted in a more compliant and less critical approach to educational practice in schools from within university teacher education programmes, and the university that was the site of this study cannot be exempted from this. In the case of the English student teachers, congruent factors impacted on their emerging professional identities: their own prior educational experience as members of the 'performative generation' (Wilkins 2011: 397), plus the policy contexts of their placement schools and university programme. English university-based teacher educators are predominantly former classroom teachers whose previous experience has also been in the performative culture of primary education. These factors combine to create a culture within which student teachers may be restricted in terms of opportunities for critical examination of practice and for imagining alternative ways of exercising professional judgement. In this context, the role of reflective activities that are typically regarded as central to student teachers' professional development in England may be of limited value. Both the student teachers, and those who support them in their professional learning, are in danger of being 'too close in.'

In strong contrast, the South African student teachers' preparation for teaching may be regarded as being 'too far away' from some aspects of classroom life. While they appeared to possess a stronger critical perspective and awareness of alternative approaches to classroom practice than their English counterparts, their criticality was often expressed in negative terms with little acknowledgement of the difficulties experienced by many South African teachers (Smit & Fritz 2008; Smit & du Toit 2016). As a result, their expectations may have been unrealistic in some respects.

The comparative lack of connection between the schools and the university teacher educators may be exacerbating this attitude, albeit inadvertently. South African university lecturers at this particular institution may be more divorced from the day-to-day realities of school life than their English counterparts, and may hold deficit models of classroom practice in South African schools. While acknowledging there may be issues of personal safety and travelling distance to schools for lecturers in some universities, a lack of professional dialogue between mentors and lecturers is likely to contribute to the negative experiences of some student teachers.

Ironically, this disjuncture may operate in both directions. The South African students were aware

of a range of learner-centred teaching strategies, which appeared to have been derived mainly from their university courses rather than observation of practice in schools. Their desire to put some of these strategies into practice, and the frustrations they experienced, led them to be critical of teachers and schools where they felt the principles of learner-centred teaching were not being applied.

At the point of transition from the end of university-based training before taking up a first teaching post, the student teachers in this study may be said to be trying identity positions on for size. The final placement experience in school is influential in encouraging the adoption of one particular position rather than another, depending on the repertoire available to the student teachers (Lanas & Kelchtermans 2015). For the student teachers in both countries, the research seemed to have provided an opportunity to articulate their identity positions during the group interviews, but it also demonstrated the limitations of the perspectives held by the two groups in terms of awareness of wider policy and educational issues. These limitations were likely to reduce their scope for exercising professional judgement.

Although the research study was limited to the use of a single interview with the four student groups, the intended purpose was to capture student teachers' perceptions of their professional identities at the point of transition from the university to the school. This presented a small window of opportunity for study. While we acknowledge that these identities may not remain stable, the student teachers' responses provide an insight into how their school placement experiences contributed to their articulation of identity at that moment. This raises questions as to the role of teacher educators in supporting students to interrogate these experiences more fully in order to clarify the principles upon which their professional judgements could operate.

As Mockler (2011) argues, teacher education should provide opportunities for student teachers to develop an understanding of their changing identities as intending teachers, and to interrogate these identity positions in the wider contexts of pedagogical theory and educational policy throughout their university programmes. At the end of their time at university, few of the South African student teachers seemed aware of the pressures experienced by teachers in schools because of educational policy changes – nor did the English student teachers question the performative emphasis that permeates current educational policy in England.

Similarly, teacher educators themselves could consider their own positions, and examine the underpinning values that inform them. This is particularly important in relation to the ways in which they believe student teachers develop their professional identities and apply professional judgement through the interactions that take place between schools and university education departments. Kayi-Adar (2015: 101) argues that teacher educators should be aware of the nature of the 'oppositional identities' constructed by student teachers during their university programmes, particularly in relation to school placements. We would also want to draw attention to the possible dangers of over-identification or affiliation with existing school practice by both student teachers and teacher educators. These issues require teasing out through reflective dialogue that enables both student teachers and teacher educators to recognise the opportunities and limitations created

by these identity constructions, and how these might impact on the exercise of professional judgement in the classroom.

There will not be easy solutions to the issues identified in either of the countries in this study but, in both contexts, teacher educators should be encouraged to examine the messages they convey to student teachers through the ways in which relationships with schools are developed and maintained, as well as those explicitly and implicitly contained in teaching sessions in the universities themselves. Izadinia (2013: 707) argues that teacher educators do not always recognise 'the challenges and complexities involved in student teacher identity formation.' This study has attempted to illuminate one aspect of this process.

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Preservice student views of teacher judgement and practice in the age of artificial intelligence

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Abstract

The fourth industrial age is characterised by artificial intelligence (AI) playing an increasingly important role in many occupations. In the field of education, statements such as 'Robots will replace teachers by 2027' (Houser 2017) have been made. But the act of teaching is complex and, while technology will inevitably influence the judgement and practice of teachers, it is not possible to reduce that complexity to a set of algorithms. Instead, we envisage complementary roles for teachers and robots and propose that teachers learn to embrace the affordances of technology to improve learning. Working with the idea that teacher education programmes have a two-fold task – preparing students with specific teacher knowledge to function in the schools of today, and equipping them to operate in an increasingly complex world – we wanted insight into what young student teachers thought about these issues. We posed the questions: 'If, as some claim, a robot can do the work of a teacher, what is the future of teaching?' 'Will teachers still have a role to play in educating children?' Data comprised student teachers' responses to a number of prompts related to this central issue in a competition that ran over a four-week period. These were analysed for content and discourse, and provide insights into how students in two teacher education programmes think about their task of making professional judgements in the classrooms of the future.

Keywords: teacher robots, artificial intelligence, teacher education, normative professionalism, teacher judgement

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Introduction

The world of the 21st century has traversed the first three revolutions – learning the basics of survival, sharing knowledge, and the invention of printing – to the fourth industrial age. This age is is characterised by artificial intelligence (AI) and technology playing increasingly important roles in many occupations. Many tasks currently undertaken by humans will, in the future, be partially or wholly undertaken by AI. A current debate in teacher education is about how artificial intelligence is likely to impact education. There are those who argue that a teacher's work comprises algorithmic processes and routines that are simple and replicable, making it easy to replace teachers with robots. Some, like Anthony Seldon, vice-chancellor of the University of Buckingham, argue that robots could replace teachers as early as 2027 (Houser 2017). We do not agree with the stance that a teacher's work can be reduced to a simple set of algorithms. In our view, the act of teaching is complex, requiring particular types of professional knowledge and judgement executed in an integrated fashion in the moment in a classroom setting. Every day, in helping young people learn, teachers have to balance multifaceted components such as their own orientation and motivation, their subject knowledge and knowledge of their learners with contextual factors such as school culture, community influences and wider socioeconomic circumstances.

We thus envisage a complementary set of roles for teachers and robots, with technology influencing the judgement and practice of teachers and with teachers learning to embrace the affordances of technology to improve pupils' learning. These are multiple – from enabling access, to analysing learning patterns and optimising learning processes (UNESCO 2019). As teacher educators, we work with a two-fold task: preparing students with specific teacher knowledge to function in the schools of today, and equipping them to operate in the progressively more complex world they are to face in the future. In keeping with this focus, we wanted to promote some critical discussion with students about how artificial intelligence and robots could influence the work of teachers of the future. Accordingly, we asked student teachers in two teacher education programmes to respond to prompts in a competition designed to explore this issue over a four-week period. We reasoned that their responses would provide us with some understanding of what young student teachers think about these issues, which could serve as a springboard for further discussions about the task of a teacher in making professional judgements in the complex situation of the classroom of the future.

Knowledge base and judgement required for teaching

There has been much consideration in teacher education literature about the knowledge base and unique types of judgement teachers need to make decisions in their everyday tasks (Dewey 1904; Schwab 1983). For instance, Darling-Hammond and Bransford (2005) argue that teachers require an interrelated base of sophisticated knowledge, skills and professional commitments in order to make professional judgements and perform their task effectively. There is also a contrasting view that teaching is simple and that anyone with basic skills and classroom competence can operate

effectively as a teacher – something that Shulman (1987), Earley (2000) and Engel (2000) argue trivialises teaching, ignores its complexities and diminishes its demands. The fact that many experienced teachers themselves are unable to articulate what they need to know and how they perform (Shulman 1987), makes defining teacher knowledge challenging. For teacher education, it exacerbates the problem of defining curriculum, understanding the nature of expert teacher practice (Collins, Brown & Holum 1991), and for determining the most appropriate methods for teaching student teachers. In fact, such constrained and impoverished views of teaching and learning (Cochran-Smith 2003) ignore the complexities of teaching and make it much easier to promote the stance that robots can easily replace teachers.

The debates about the complexity of a teacher's task play out against the backdrop of contestations about teaching as a professional field. In this paper, we draw on Shalem and Slonimsky (2013) to argue that not only do we consider teaching a professional field but that teachers require a particular type of professional judgement to enact their tasks in the complex world of the classroom. Shalem and Slonimsky (2013: 80) contend that teachers have 'a reservoir of deductive propositions' and 'disciplinary-based knowledge of procedure' that informs their judgments, and that their resulting actions are imbued with professional freedom and autonomy in a practice that generates new knowledge for both the teacher herself and for the field. In deliberating on how to describe what constitutes teacher professional judgement, we find useful the notions of instrumental professionalism (IP) and normative professionalism (NP), as argued by Bakker and Montessori (2016), which followed a three-stage development process from the 1990s. Instrumental professionalism, according to Bakker (2016), refers to a teacher's mastery of the components of the education system that are assumed to lead to good education and educational outcomes. These elements include the scope of a teacher's subject content and pedagogical knowledge, rules and codes of conduct, the aims of the curriculum and other processes such as assessment used to judge learner progress through the system. Such defined sets of teacher competencies, which are assumed to be concrete and measureable and sufficient for judging good teaching, often sit at the heart of the now largely discredited competency-based models in teacher education of the mid-20th century (Korthagen & Kessels 2001).

On the other hand, normative professionalism is much broader and encompasses development at the nexus of knowledge of the profession, the social and societal context within which education occurs, and a teacher's mindfulness in executing her or his teaching tasks. Teacher mindfulness requires a reflexive approach that includes teachers being aware of their own subjectivity in considering the multitude of factors that play a role in teaching situations, and having the required repertoire of tools to interpret the situation knowledgeably before making a final decision that informs professional action. Because it is the teacher who is acting subject (Engestrom 1987) in the nested activity systems of the classroom, school and educational system, she or he will need to use judgement in determining which tools of the profession, and the levels of the system, to leverage in particular situations with individual learners when executing tasks (Bakker 2016). In this process, the teacher will need to bear in mind what is in the best interests of the young persons and how best to promote their learning. Even then, every judgment and action leads to a new set of

circumstances that, in turn, will require reasoning and rationalisation to inform further judgements and actions. All of these will be directed by what young people in schools need, and by what is the right thing to do – making such decisions increasingly moral and, to an extent, subjective (Hargreaves & Fullan 2012; Bakker 2016). The complexity of teaching, in turn, creates a set of challenges for teacher education, some of which are generalised (Livingston 2017), such as tailoring learning opportunities for student teachers to use technology. Others may be more specialised such as understanding how differing points of view between students and their supervising teachers are reconciled in, for instance, student practicums.

The future: Artificial intelligence and robots in education?

A 2018 Elsevier report on tracking trends of artificial intelligence in China, Europe and the United States of America notes the exponential increase in AI research and development, technology and application, with many nations developing strategic plans to understand how AI impacts their place in the world order, their economic strength and their security. Within this frame, aspects such as ethics and determining how AI will change jobs and economies are considered (Elsevier 2018). According to Olley (2018), AI is understood as an overarching term used to describe the aim of creating computers that apply judgment much as a human being would. Within this explanation, Annoni (2018: 13) argues that it is possible to 'differentiate between weak AI, i.e., machines that can simulate thinking within a narrow context to accomplish a specific task, and strong AI, i.e., intelligent machines that can reason.' Timms (2016) makes the case for educational robots assisting teachers in the classroom, and envisions smart classrooms fitted with sensors and unique identifiers able gather and transmit data to enhance and support learning using the Internet of Things (IoT). While the field of artificial intelligence in education (AIED) is not new, it is gaining traction given the onset of the fourth industrial revolution and associated innovations that will require adaptation and appropriation for educational purposes (Roll & Wylie 2016). AIED continues to use techniques borrowed from cognitive and behavioural science to develop artificial intelligence systems that can seamlessly adapt to preferred ways of learning, taking into consideration the affective component of learning (du Boulay 2016).

Currently, the application of AI in education is mainly limited to educational robots (Olofsson et al. 2011), with emphasis on technical aspects such as physical attributes, the range of possible human–robot interactions, robot perceptions such as face detection, posture recognition, semantic meaning-making and affective expression. The wealth of rich data readily available from digital learning environments, coupled with the fast growing field of machine learning with sophisticated algorithms, is already changing learning spaces (Gardner et al. 2018). According to Lui et al. (2016), the most popular applications of robots in education are restricted to a few subjects with STEM education (74%), language learning (21%) and, to an extent, special education (4%). They argue that the unbalanced deployment of robots in curriculum areas perpetuates disciplinary silos, and can hamper the pace of future development and acceptance of educational robots across the educational spectrum. Finding the balance between the artificial–natural and recognising the

benefits that AI and associated technologies can bring to the classroom to improve teaching and learning is a challenge. So too, is the perceived lack of affective interaction and expression of teacher robots. Other considerations include cognisance that gains such as automated grading, personalised tutoring, learning analytics, assistive learning, virtual reality and immersive classroom experiences are only really useful if accompanied by a pedagogy of care and compassion characterised by passion, ethics and empathy.

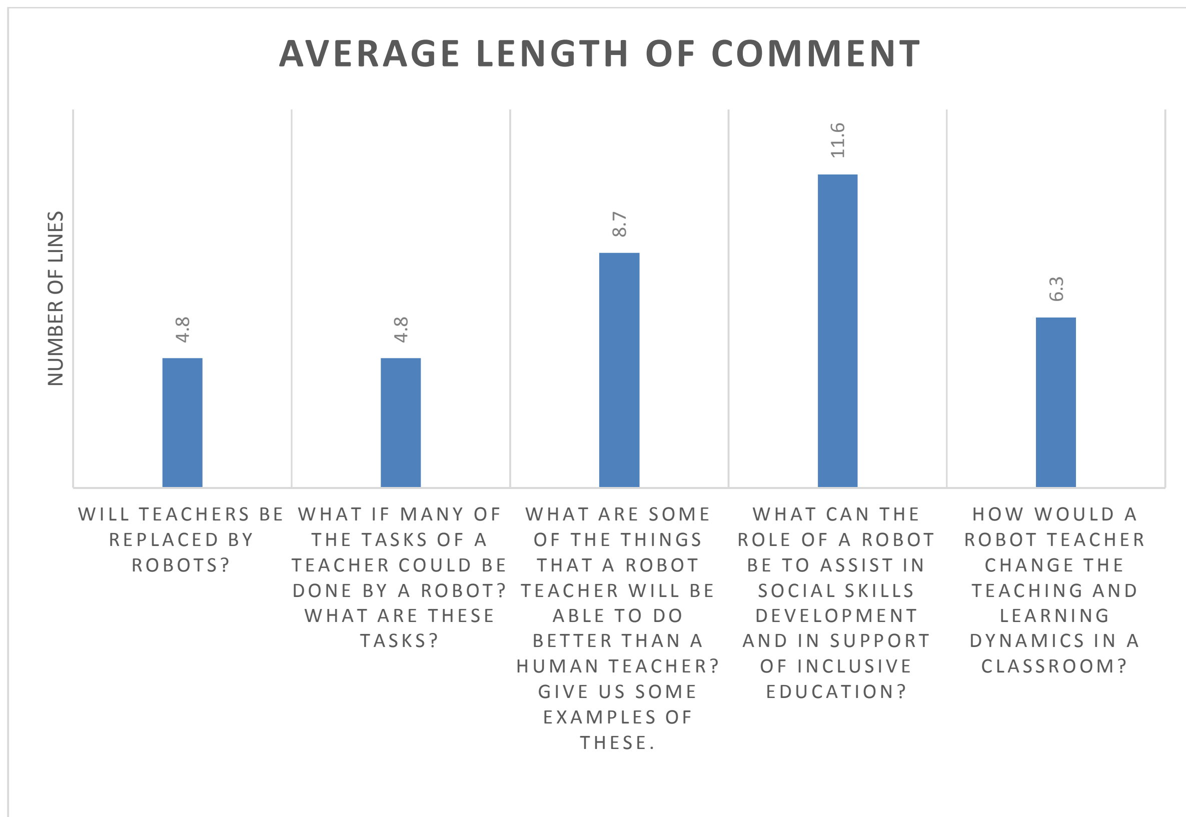
Methodology

This study was conceptualised as a generic qualitative study (Merriam 1998) because we were interested in investigating what students thought about the role of artificial intelligence and robot teachers in education and how they would influence the role of teachers. Accordingly, we purposively designed an online competition in which students responded to two questions on the issue of teachers and robots, enabling us to gain some insights into what they thought.

The Robot Teacher competition was compulsory for intact groups of students enrolled in semester-long (14 weeks), ICT-focused courses in two preservice teacher education programmes. In South Africa, all preservice student teachers are educated in either the one-year, full-time Post Graduate Certificate in Education (PGCE), or a four-year Bachelor of Education (BEd) degree for primary school (Grades R–7) or secondary school (Grades 8–12). A prescription of the minimum requirements for teacher education qualifications (Department of Higher Education & Training 2015) is that all newly qualified teachers must be able to use information and communication technologies (ICTs) competently to enhance educational innovation and teaching. Consequently, all teacher education qualifications focus on the integration of ICTs in teaching, either in stand-alone ICT courses, or with ICT integrated into subject methods courses. In this study, participants comprised second-year students (n = 120) in a BEd (primary school) programme, and second group of third-year students (n = 450) in a BEd (secondary school) programme. Other preservice student teachers were also encouraged to participate. Our reasoning for the two compulsory groups was to leverage student deliberations about the role and place of ICT in education and how this influences the task of a teacher – issues that feature in their ICT-focused courses.

To launch the competition, a briefing document was drafted providing some background to the challenges of teaching in the fourth industrial revolution. We provided examples of service robots already employed for educational use elsewhere in the world to contextualise the issue for students, and launched the competition with the following questions: ‘If, as some claim, a robot can do the work of a teacher, what is the future of teaching?’ ‘Will teachers still have a role to play in educating children?’ A group of senior tutors and the first author monitored student responses, which generated a number of comments, likes and shares. Based on each week’s responses, they posed new questions and prompts for further discussion. Details are captured in Graph 1.

Graph 1: Length of response to each question



Our analysis focused on the views of participants and interpreting the meanings they gave to their construction of reality (Henning, van Rensburg & Smit 1994; Chamberlain 2000) over the period of the competition. This approach is in keeping with the view of Caelli, Ray and Mill (2003) who describe generic qualitative studies as those that endeavour to discover and understand a phenomenon, a process, or the perspectives of the participants involved in the study. This meant that we would work to build a complex holistic picture while analysing the words used by participants to describe what they thought, and report on these (Creswell 2007). We started by collating the number of student responses each week to get an indication of which topics engendered the most responses, and to track the length and complexity of such responses. In total, there were 1,156 lines of text derived from 157 comments, with an average length of 7.24 per comment. There were also 300 likes and 129 shares during this period. The question in the week of 10 October 2018 had a significantly higher yield in all dimensions in comparison with other questions. There was also an increase in the lines of text from 198 in the previous question to 578 – equating to 380 additional lines of text derived from comments. These details are captured in Table 1.

Table 1: Weekly questions and associated data

Dates	Questions	Likes	Comments	Shares	Lines of text	Average length of comment	Length of longest comment
01 Oct	Will teachers be replaced by robots?	50	18	16	87	4.8	14
02 Oct	What if many of the tasks of a teacher could be done by a robot? What are these tasks?	68	37	25	178	4.8	19
04 Oct	What are some of the things that a robot teacher will be able to do better than a human teacher? Give us some examples of these.	74	34	36	198	8.7	24
10 Oct	What can the role of a robot be to assist in social skills development and in support of inclusive education?	89	50	27	578	11.6	29
17 Oct	How would a robot teacher change the teaching and learning dynamics in a classroom?	19	18	25	115	6.3	17
		300	**157**	**129**	**1,156**	**7.24**	**29**

In the first few questions, the average length of comments was 4.8 lines of approximately 75 words each. As the weeks progressed, the comments became more comprehensive, with the highest number of lines (on average 11.6) and 189 words recorded per comment to the fourth question. The written texts were analysed first by the first author, using qualitative analysis tools available in Altas-ti. We searched for recurring themes and patterns, maintaining a balance of openness between inductive coding, working from the students' words and phrases and deductive coding, using the ideas associated with instrumental professionalism and normative professionalism to guide the analysis. This process entailed first coding the participant responses per data set in each week of the competition. From the responses, utterances of similar meaning were clustered and codes were named; we stayed as close to the meaning in the responses as possible. Thereafter, the codes were grouped into a number of categories that were labelled conceptually to reflect their content. At this point, the second author gave input into the analysis process and both authors sought consensus with respect to the conceptual categories created. These are captured in Table 2. The categories were then sorted, based on how they related to the notions of instrumental and normative professionalism and informed the themes that are presented as the findings (Charmaz

2003; Henning et al. 2004).

Table 2: List of codes and categories

Areas of professionalism	Categories	Codes
Instrumental professionalism	Pedagogical content knowledge (PCK)	Content knowledge
		Teaching strategies
		Curriculum delivery
		Inclusivity
	Teacher efficiency	Punctuality
		Curriculum delivery
		Good teaching
		Teacher accountability
	Assessment	Learner progress
		Immediate feedback
		Remedial opportunities for assessment
		Tailoring assessment
		Design for learning (customised – inclusive)
Normative professionalism	Teacher mindfulness	Teacher bias
		Task execution
		Relating to learner circumstance
		Best interest of the learner
		Leaner care
	Situational knowledge	Learner disposition
		Learning needs
		Learner family structures
	Teacher as role model	Learner aspirations
		Learner motivation
		Teaching as vocation
	Teacher values	Teaching as moral imperative
		Teacher empathy
		Ethical conduct
		Stewarding learner (teacher as parent)

Presentation and discussion of findings

The overall findings of this study are that students have a naive conceptualisation of the role of AI and robot teachers and, while they expound on the value of AI and robot teachers, they make the argument that due to the complexity of teaching, human teachers cannot be replaced. They propose a complementary set of roles for each in the classroom of the future in a type of partnership to improve teacher efficiency and address teacher shortcomings whilst addressing personalised learner needs.

A naive view of AI and robot teachers

The findings indicate a tension between students' recognition of the value of AI and robot teachers, and a naive conceptualisation of the future of AI applications in education. For us, the naivety is unsurprising because it comes from both a constrained view of the possibility of future technologies and the power of AI, as well as students' rather narrow views of what teachers' work and judgement in the world of the classroom entail. The dominance of their school learning experiences and the resultant apprenticeship of observation (Lortie 1975) on student teachers' perception of what teachers do has been the subject of much debate in the literature (Grossman 1991), with many claiming that it is one of the most difficult aspects to overcome in preservice teacher education. Most students in their preservice years are not clear on how many different kinds of teacher knowledge and forms of judgement combine to enact complex decision-making in the classroom (Darling-Hammond & Bransford 2005). As Grossman et al. (2009) remind us, students are familiar with the work of teachers from their own schooling and thus are likely to underestimate its complexity. They require carefully structured programmes of education in which coursework and practice experiences are interwoven for them to 'see' the myriad elements that make up the complex work of teachers enacted in uncertain and unpredictable settings.

Students' view of machine learning as static and automated is evident in the limited range of possibilities they attribute to robot teachers. For instance, they seem to see robots as executors of human teachers' decision-making and programming primarily in order to address pupils' learning and to account for teachers' shortcomings. We are of the view that the rather constrained view of AI and teacher robots arises from the images currently utilised in classrooms across the world and students' familiarity with, and exposure to, mainly weak AI (Annoni 2018). It is these views that probably led to the following types of comments: '[robot] looks a lot like toys … they can be programmed as to what they say, how they respond, interact and how they respond to sensations such as touch.' Even when the benefits of AI and robot teachers were acknowledged in the classroom situation, it was with the idea that programming of teacher robots is restricted to 'only provid[ing] correct answers therefore limiting learners' creative thinking abilities because rote learning will be encouraged and learners in schools will be confined to low levels of Blooms taxonomy.' Other deficits of teacher robots mentioned in the data are that they are unable to display authentic human expression, voice and movement – aspects students regard as irreplaceable in a teacher. A number of comments reflected this view:

> Robotically designed bodies being stiff and inhumane like, therefore making it impossible for them to have effective and appropriate body language while speaking.

> How the learners will feel about the voice of the robot as a teacher's tone is important.

In their expressions of the limitations of robots, students' comments reveal an awareness of teacher mindfulness, particularly the multiplicity of factors influencing teaching situations and teacher judgement. It is in this respect that students' responses show some measure of sophistication about teacher roles, for instance, recognising the importance of centralising children's needs as part of decision-making in the classroom (Darling-Hammond 2006b). Students feel robot teachers are ill-equipped to understand human reasoning because pupils are 'complex creatures and sometimes fail to understand reason.' It seems that students believe that AI and teacher robots are ancillary to human teachers in the classroom, with clear roles ascribed to both. They argue that 'human teachers and robot teachers should not be set off as binary opposites that cannot exist alongside each other,' albeit with the human teacher occupying a superior position in this collaboration. Students, for example, made remarks such as: 'Robots are programmed and set by human beings; though a robot is not human it can mimic human thought and thus human interaction.' Thus, even though students concede that robots are programmed to 'show emotion in their artificial facial expressions, these expressions are not enough and not real enough to teach a human child the necessary skills to be able to express themselves.' There appears to be a clear recognition that children need a teacher equipped to gather multiple sources of information on a learner in order to make professionally grounded judgements (Darling-Hammond & Bransford 2005). Again, student views are probably attributable to the dominance of images of weak AI in education (Annoni 2018).

Overall, the data speaks to human teachers as the only entities capable of 'assisting the learners with their social and emotional wellbeing.' Students' recognition of these elements of teacher judgement, most often associated with normative professionalism, is likely due to a number of factors. First, because of the emphasis of these frameworks in their university coursework, in which the role of a teacher in addressing social injustice in the educational and social system is a focus (Darling-Hammond, French & Garcia-Lopez 2002; Kumashiro, Pinar & Ladson-Billings 2009; McDonald & Zeichner 2009). A second factor is the systematic integration of a central organising framework focused on young children's development (for the primary school programme) and adolescents' development (for the secondary school programme), particularly their social and emotional development, into students' university coursework. This is a hallmark of exemplary models of teacher education (Darling-Hammond 2006b), elements of which have informed the construction of our teacher education programmes in a quest to develop the reflexivity required of thinking professional teachers. However, the ability of teacher education curricula that enable student teachers to learn 'refined knowledge and skills for assessing pupil learning' (Darling-Hammond & Bransford 2005: 289) while still developing a sophisticated repertoire of practices, and an understanding of which to use for particular purposes, is often an elusive goal in preservice teacher education. For instance, Lampert et al. (2013) have shown that to

prepare students for complex and ambitious mathematics teaching involves integration between practices, principles and subject matter knowledge and the building of a dialectical relationship between the teacher, learner and subject content in order to create the *adaptive expertise* (Bransford et al. 2005) required of professional teachers. This continues to be a struggle for teacher education.

Robot teachers: An indictment of human teachers in South African schools?

Despite the tension envisaged in the complementary roles of human teachers and robots, it is clear that student teachers recognise the value that robot teachers bring to the educational situation. A strong theme was that 'robots as human constructs … are built to supplement human teachers' shortcomings' and 'carry out a complex set of series of actions automatically.' It is particularly in the areas of content knowledge and pedagogical content knowledge development (Shulman 1987), as well as assessment, that students see robots as having the edge over teachers. In the areas of curriculum knowledge and teachers' pedagogical content knowledge, the perception is that robot teachers would add value in expanding existing teacher knowledge and their pedagogical strategies, increasing access to information and addressing misconceptions early on. Student teachers argue that robot teachers will have access to 'up-to-date methods of teaching … and multiple explanations of every step taken through the content to accommodate the learner' which can bring 'concepts into a real-life experience.' This is akin to the reasoning of Abbott (1988: 436), that the combination of academic and diagnostic knowledge in a situation is what sets a professional apart from a lay person and what locates 'practical knowledge in a formal process and not in everyday experience.'

Robot teachers are also said to have 'access to information on a much greater scale than any human whose knowledge is ultimately restricted at a certain point and whose memory could never match up to a programmed robot.' Although probably not what Darling-Hammond (2006a) envisioned in her argument for *expert collaborators* for student teachers in an age of information explosion, the value of vast and infinite robot content knowledge is clearly regarded as an advantage by student teachers. Students also believe that robot teachers can give 'valid examples that learners can relate to' and they include ample references to specific learning areas where robot teachers can enhance curriculum delivery, such as 'for teaching real-world application of maths, science, programming and engineering' or during experiments where a 'chemical reaction in science … a robot can simulate this chemical reaction and learners can learn from them how to conduct some experiments virtually.' They also anticipate an increase in opportunities to tackle cross-curricular tasks because 'robot teachers can also be tools to facilitate the transfer of knowledge through trans-disciplinary and activity-based-projects.'

Implicit in these remarks is an indictment on human teachers, who they note, 'only use teaching methods that they relate to' and 'only use examples from the textbook rather than coming with their own that will help learners to understand content, which creates barriers [to] learning.' Human teachers are also accused of not having adequate content knowledge, with students noting that 'robot teachers will be able to give the correct answers all the time without making a mistake'

and that ‘robots cannot create misconceptions.’ These sentiments could be attributable to the students’ own experiences as learners in schools or their current teacher role models during teaching practicum (Gravett, Petersen & Ramsaroop 2019). We suspect both are contributing factors. Our research over the last 10 years in teacher education at a Johannesburg university has shown that students are extremely disparaging of their own school teachers, with many reporting poor learning experiences (Spaull 2011) and inadequately qualified and knowledgeable teachers who struggle to convey curriculum content. And, as student teachers, the far greater majority describe poor teacher role models from their school practicums who are unprofessional, have inadequate content knowledge and are unable to create orderly learning environments (Gravett et al. 2019). This is unfortunately a pervasive problem in many South African schools (Spaull 2013) so it is likely that these experiences of schools and teacher professionalism permeate students’ reflections of how robot teachers may function in educational settings.

The particularity of a number of contextual factors in South African classrooms is also highlighted in student responses. One is the number of curriculum changes South African teachers have had to contend with over the last 20 years and their disastrous, long lasting effects on the effectiveness of schooling in the country (Leibbrandt, Woolard & Woolard 2009). Here, students indicate that a robot can be rapidly ‘updated with the new information, providing teachers with sufficient information for them to prepare for their lesson, give teachers more methods and ways of delivering the content.’ A second is the immutable problem of teaching in a country with 11 official languages. Young children enter schooling where children have mother-tongue language of instruction for the first four years (from Grades R–3) and then have to switch to English from Grade 4 onwards. The complexity of this issue has been debated in numerous publications (Pretorius 2014) where educational researchers cite its detrimental effects, particularly on African learners who are then at a distinct academic disadvantage in comparison with their English and Afrikaans-speaking peers who start their schooling in a home language. As African students dominate in the two teacher education programmes we researched, they would have had first-hand experience of the difficulties of learning in English, and this is likely the reason this aspect is so prominent in the data. Here, student teachers are keen on pointing out the advantage of robot teachers using ‘various languages in the delivery of a lesson to reinforce concepts and to bring about greater understanding.’ Also, the enhanced capability of robots to ‘express and teach the content in any of the 11 languages programmed into it’ and even to ‘code switch to respond to learner language needs’ are central themes in the data. According to students, teacher robots who can ‘appreciate and use different languages will bring great change to the classroom of the future.’

A third contextual factor is the lingering legacy of unequal apartheid-era education, where issues of race, culture and gender discrimination are in the forefront of schooling. For instance, in the very first few days of the 2019 school year, newspaper headlines were filled with accusations of racism in a white teacher’s unfair treatment of young African learners (Timeslive 2019). Such stories dominate headlines often and, taken in conjunction with students’ own experiences of discrimination in the schooling system, is a likely reason for them asserting that robot teachers will ‘treat all the students fairly and equally without discriminating against gender, race, disability,

class and religion.' A fourth challenge is the unfavourable teacher-learner ratios (sometimes 1:50), which compromises individualised learner instruction, coupled with a fast-paced curriculum that requires rapid advancement through curriculum milestones, carefully checked off by education officials (Lavonen et al. 2018).

Students, many of whom would have been educated in such conditions, indicate that:

> Not only does the teacher not have time to address each student, but they rely on one explanation of material for all … while a robot teacher will have the ability to allow each individual learner to access material in a way that suits them and at their own pace.

It is a recognition of the multiplicity of roles teachers adopt in any teaching moment, such as managing the educational materials, the timing, their own voice and tone, encouraging student engagement and discipline, and managing learning transitions (Lampert et al. 2013) that students are reflecting. Further critique of current teachers is also evident in the comment that 'teachers face challenges of using their time correctly in that they either over-share content and not finish it in time or finish the content early, resulting in lack of meaning-making and understanding from learners' – aspects that compromise learning.

The last area is that of assessment where students point to the bias and slow pace of human teachers. Robots are seen as 'objective and … [un]bias[ed] … when dealing with learners with special needs as they have unlimited patience and are able to repeat work until a learner understands without getting frustrated impatient or irritated.' The associated issue of learner punishment is concerning because, although the South African Schools Act bans corporal punishment, many students tell harrowing stories of this practice continuing at schools, often with the tacit approval of principals (Ndlazi 2018). In this respect, students note that there would be 'zero unlawful punishment of learners.' Students also lament bias in assessment, and claim that with robots 'there wouldn't be cases of favouritism, which would mean that all students are assessed fairly and on the same scale' and that 'robots teachers will treat all the students fairly and equally without discriminating against gender, race, disability, class and religion … promote inclusion.' In addition, the acceleration of feedback to improve learning is emphasised with students arguing that teachers 'fail to give feedback after a task due to laziness and not [being] dedicated enough.' Given the exposure to online assessments as part of the increasing incorporation of ICTs in their ICT-focused courses and in the rest of the teacher education programmes, students see the advantages of robot teachers for 'recording of marks, setting and marking of online assessments, reporting of assessment marks via the creation of report cards that can be accessed online, and evaluating learner results.'

Robots cannot replace human teachers

The data show that students acknowledge the benefits of robot teachers, but are of the view that robots cannot replace human teachers. They cite many examples of how robot teachers can improve teacher efficiency by relieving teachers of the repetitive 'administrative tasks of the educator' such as recording of attendance and performance scores, filing and reporting, and as a

way of reducing teacher workload and therefore 'limit[ing] teacher burnout that has exacerbated teacher shortage.' The view that less administration 'dumped on teachers would hopefully make them less stressed' and afford them more opportunities to engage meaningfully with learners, is also a critique of the administratively loaded South African reporting systems in schools (Spaull 2013). Time management is identified as another area where robot teachers can add value in 'being able to complete the syllabus on time by keeping to certain routines, and revise the course as many times as possible for the learners.'

More important, is that student responses provide evidence of a growing understanding of the complexity of teaching and how this relates to concerns about teacher well-being. Teacher robots are, for instance, perceived as useful for enhancing teacher efficiency – by addressing the more nuanced learning needs of learners – to include early identification of at-risk learners, noting that 'a robotic teacher [is] able to quickly develop algorithms to detect at-risk students and immediately create a personalised plan for them that is aligned to the weaknesses reflected by their assessment tasks.' Robot teachers can also assist learners who 'might be slow, for instance, if in the classroom there are learners who struggle to understand a certain concept, the robot can assist those learners' to 'do one concept as many times as she can until she get it right.' In their reasoning and argumentation for this point of view, students credit robots for their usefulness in 'identifying learners' strengths and interests and building on them' and delivering 'tailored learning, carefully evaluating every response to calibrate when to stick with the current topic and when to move onto the next.' It is apparent in the discourse of student responses that teacher mindfulness, situational knowledge of learners, the teacher as a role model and teacher values – all aspects associated with the idea of normative professionalism (Bakker & Montessori 2016) – have infiltrated their thinking and conceptualisation of a teacher's role. Student comments on the complexity of teacher judgement in teaching, with respect to managing learner discipline and behaviour, rate high on the list of emotionally distressing areas (Skinner & Beers 2016) they argue only human teachers can address. There is also recognition that despite a 'teacher becom[ing] overwhelmed and hampered by human emotion …. tired, frustrated or sentimental [blaming themselves] about the learners' shortcomings,' human teachers can relate to young children and adolescents in a way that no robot, even with sophisticated algorithms, can. Students say that robots, for instance, 'cannot put themselves in learners' shoes' or understand the 'human realities that learners face every day.' According to students:

> A human teacher will always understand learners personally (as individuals), be able to identify what they need in order to understand what they are taught, and can be able to relate what they are learning in class to a certain event (may be recent or in history) that happened within their communities as examples for them to understand.

The data reveals students' nuanced understanding of teaching with many commenting in a similar vein: 'The world seems to misunderstand the role of a teacher in its entirety. They simply think that a teacher is only there to disseminate knowledge or act as a dispenser of it.' Their responses thus point to cognisance of teaching as a professional occupation and of teachers as subjects who have

mastered a body of abstract knowledge required to legitimately belong to, and function in, the world of the classroom and education (see, for example, Abbott 1988). The very focus of the competition was an affront to some students, and their initial comments were about their fears on teaching and the teaching profession being undermined. This is not uncommon in South Africa where teaching as career choice, particularly in the early years of schooling, is often regarded as the least desirable profession (Petersen & Petker 2012). Here, the primary concern was that introducing robots and AI into classrooms would mean that teachers would no longer be 'agents of transformation, but will instead be seen as agents of idleness,' and that teaching as 'profession will be perceived as being futile.' The idea of a teacher as an agent of transformation points to students' cognisance of the specialised professional knowledge required by teachers in order to judge 'what is permissible, right or wrong, true or false, appropriate or inappropriate, and what is better and why, in short, what counts in [the] practice' (Shalem & Slonimsky 2010: 81).

In particular, these students' critique of a teacher robot's ability to serve as a role model for young people, or provide the requisite educational care required in schools, was harsh. Our graduate attributes and teacher education coursework place a lot of emphasis on the development of an ethic of care (Noddings 1984), and it seems to have permeated the discourse and envisaged practices of these future teachers. Students study theories of care in conjunction with children's cognitive, social and emotional development as part of their university coursework and their comments that a robot 'cannot examine learner's feelings where deep emotional intervention is needed' or that robot teachers might not recognise 'that each one of those learners are different, and thus requires one to deal with them differently' are important to note. Student teachers acknowledge that there is 'a certain emotional aspect that is required when teaching in order to make it effective' and fear that even simulated emotion from advanced or sophisticated teacher robots would easily lead to disaffection and emotional sterility.

The ability of human teachers to relate to the everyday plight of poor and often disenfranchised learners cannot be underestimated, particularly in a country like South Africa where the gap between rich and poor is growing all the time. Human teachers, students argue, are 'able to place themselves honestly in the learners' shoes, they can cry with learners and help learners at a human level because they know what it means to be human.' Ultimately, this group of students took a firm stance on what it means to be a teacher in the age of AI and robots, best encapsulated in the following points made on the platform: 'Teaching has something to do passion; and I want to know whether robots have a bone of passion in them?' 'Passion is something human and can never be replaced by something else.'

Conclusion

We initiated this study in order to stimulate dialogue with students about the role they think artificial intelligence and robots are likely to play in classrooms of the future. In an age of AI and increasing technology, we were particularly interested in how their responses could serve as a basis for further discussions about teacher professional judgement in complex teaching situations.

Using an existing base of teacher education literature to interpret the findings, we are of the view that although student teachers in this study could not always clearly articulate all the parameters of what constitutes a professional teacher's work, they leverage a specialised blend of knowledge types, consonant with professional training in the field of teacher education, to assess the value of robot teachers. We invoked the ideas associated with instrumental and normative professionalism to argue that teacher judgements require an appropriation of, and enculturation into, a discrete and specialised body of knowledge to enable teachers to evaluate measureable components of success in education such as processes for tracking learner progress, as well as mindfulness and reflexivity, in determining the interconnection of factors that impact classroom and teaching situations.

In this study, it seems that student teachers, despite a naive view of the possibilities of AI and teacher robots, have a relatively sophisticated understanding of the relationship between a teacher's professional role and effective instruction. We believe this is due to their developing professional expertise through a systematic and structured teacher education programme that is premised on an organised body of knowledge (Winch 2012). In addition, their own often negative schooling experiences – and the emphasis on care, social justice and learner-centred education that we promote in their teacher education programmes – also seem to play a role, and are evident in their responses. In particular, students in this study were able to balance the tension between envisioning a value-added role for teacher robots in classrooms while emphasising the indispensability of human teachers; they did so by proposing a complementary set of roles for human and robot teachers, clearly spelling out the tasks they believed each party could play. It seems that student teachers share our view that a teacher's tasks cannot be reduced to a set of algorithms and that teachers are not easily replaceable with robots.

As student teachers, the participants in this study articulated their vision of how AI and robot teachers can improve the lives of learners in schools, from enabling access and optimising learning patterns for pupils, to improving the working conditions of teachers by reducing the workload for tasks such as grading and assessment. The Teacher Robot competition was successful in stimulating robust conversation on the role and place of AI and robots in education – between students themselves and with their teacher educators. Thus, although students cannot clearly articulate the complete, integrated sets of particular knowledge and judgement required of teachers as professionals, they are able to envision complementary roles for human and robot teachers and, in so doing, have provided a considered response to the question of how important 'secure-by-design algorithms' and values (Annoni 2018: 12) should underpin the use of AI and robots in education.

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Developing standards for inclusive teaching in South Africa: A dilemma analysis

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Abstract

As inclusive education has gained traction internationally, there has been a demand for teachers who are equipped to teach diverse learners. This has led to attempts to capture the competences of inclusive teachers in scholarly literature and to the development of standards for professional teaching, generally, and for inclusive teaching in particular. Sets of national standards are expected to enhance the professional status of teaching, and to improve student outcomes by describing the knowledge of teachers, developing a shared language of practice, promoting accountability, and directing professional development initiatives. This paper is concerned with the development of a set of standards for inclusive teaching to inform initial teacher education in South Africa. The conversations of people involved in the standards generation work were, with permission, recorded and analysed. Analysis of the data showed that, during deliberations, a number of dilemmas emerged. The first dilemma is whether standards for inclusive teaching should be described apart from the more general professional teaching standards applicable to all teachers. The second dilemma was a contest about whether the standards should adopt broad or narrow definitions of inclusive education. The third relates to the primacy of context, and the fourth dilemma concerns the significance of learner differences for teaching and learning. The resolution of these dilemmas is explained with Wiredu's (1996) concept of the *will to consensus* and professional judgement of the participants.

Keywords: teaching standards, inclusive teaching, initial teacher education, dilemma analysis, professional judgement, consensus

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Introduction

Inclusive education is concerned with identifying and addressing exclusion in education, and developing teaching and learning environments that support access, belonging, participation and success for all learners (UNESCO 2018). Signatory countries (which include South Africa) to the United Nations Convention on the Rights of Persons with Disabilities (CRPD) are expected to 'ensure an inclusive education system at all levels' (United Nations 2006, Art. 24.1). In the years after the end of legalised apartheid, South Africa developed a framework for the establishment of an inclusive education system. This framework, outlined in White Paper 6 (Department of Education, DoE 2001), builds on constitutional values of the right to equality, human dignity and freedom from discrimination. Teachers are seen as a key resource in the quest for a more inclusive education, and teacher education is seen as an important part of the country's overall progress towards an inclusive education and training system (DoE 2001).

As inclusive education has gained traction internationally, there has been a demand for teachers who are adequately prepared to teach diverse learners. Meeting this demand has required different strategies. These have included the recurriculation of initial teacher education (ITE) programmes to ensure that prospective teachers are well prepared for the demands of inclusive teaching, finding ways to assess their work-based teaching practice for evidence of inclusive teaching practice, and the rolling out professional development activities for in-service teachers. These initiatives require that 'inclusive teaching' is defined and delineated, with clarity on what counts as inclusive practice (Florian 2014). To this end, there have been various attempts to capture the competences of inclusive teachers in scholarly literature (for example, Florian & Rouse 2010; Loreman 2010; European Agency for Development in Special Needs Education 2012) and in the development of national policy standards for professional and inclusive teaching.

The focus in this article is the tensions and dilemmas that arose during the development of a national set of standards for inclusive teaching for South Africa. The standards development process was undertaken in 2017 as part of a wider initiative with the South African Council of Educators (SACE) to address variations in the quality of teaching nationally through a set of general professional teaching standards. Simultaneously, stakeholders in teaching (unions, government departments and teacher educators) met to develop a set of nationally relevant standards for the design of inclusive education coursework in initial teacher education programmes. Drawing on the conversations of the participants in these meetings, we identify four dilemmas that emerged in the process and design of the standards. We will show that some of these echo dilemmas in the field of inclusive education internationally, and suggest that a 'will to consensus' (Wiredu 1996: 183) enabled an acceptable resolution of the dilemmas. The will to consensus required participants to draw on their specialist knowledge and exercise their professional reasoning and judgement in response to tensions between their personal ideological commitments, their stakeholder imperatives and their shared mandate of developing a broadly acceptable set of standards. In so doing, we contribute to the literature on standards for

professional teaching by addressing the concern that research on these documents often 'leave[s] those who create the representations largely out of the picture' (Mulcahy 2011: 98). We also bring the discussions on dilemmas in the field of inclusive education into conversation with the literature on teaching standards – intending to further an understanding of both.

Standards for professional teaching

Standards for professional teaching promise much, and can be found in education systems across the globe (Adie & Wyatt-Smith 2018). Standards are intended to enhance the professional status of teaching and improve learning gains in various ways. First, the articulation of quality teaching demands that the professional knowledge of teachers is described and organised. A set of standards provides a common language of practice (Danielson 2015; Loughland & Ellis 2016) and has been shown to be especially valuable for newly qualified teachers who are starting their careers. Second, members of the profession can hold one another to account against agreed criteria of good practice. Third, standards shape and provide direction for professional development (McDaid 2010; Mulcahy 2011), and the way standards are framed has a significant backwash effect on the nature and content of teacher education programmes (Furlong 2013). Teaching standards may also support national strategies and reform efforts because they are embedded into standards documents and thereby influence teacher thinking (Carrington et al. 2015).

Standards for professional teaching do not necessarily live up to their promise. They potentially overburden teachers who may see the application of standards to their practice as a bureaucratic imposition. When associated with measurement and performativity, they can reduce teachers' professional discretion and become a way in which governments regulate and control teachers. Furthermore, standards may present a fragmented account of teaching, and reduce it to a series of discrete behaviours (Forde et al. 2016) that perversely undermines the integrated nature of expert practice. Standards are also devised outside the contexts in which they are enacted, and precision in description belies the messiness of practice (Kostogriz 2018).

The development of standards for inclusive teaching in South Africa

National reviews of ITE programmes in South Africa have found substantial variations between the ways different universities offering ITE programmes conceptualise coursework to prepare students for teaching (Council for Higher Education 2010; Deacon 2016). The national Initial Teacher Education Research Project lamented the 'lack of a self-regulating teacher education (and teaching) profession [that is] able to clearly delineate a common, agreed set of ITE knowledge and practice standards and curricula to which all universities should conform' (Deacon 2016: 25). The development of standards for coursework for inclusive teaching in South African ITE programmes is one attempt to address the variable quality across different higher education institutions offering ITE programmes. The initiative has been spearheaded by the Department of Higher Education and Training (DHET) as part of the wider European Union-funded Teaching and Learning

Development Capacity Improvement Project (T&LDCIP). The British Council was also involved in this process.

A three-phase process was put in place to develop the standards. Phase One of the process was a large colloquium held at the Department of Basic Education's (DBE) offices. This colloquium comprised plenary sessions with speakers from South Africa and internationally, and a series of discussion groups. Stakeholders at this meeting included academics from many of the South African universities, officials from both the DHET and DBE, non-government organisations and activist organisations, and members of civil society organisations. The purpose for creating standards, according to the programme of this colloquium, is to

> lead to greater standardisation and convergence in teacher education programmes. Initial teacher education programmes vary greatly, and the intention is to ensure that all programmes address inclusive education in sufficient depth and breadth, and include substantive content and academic rigour in order to produce better teachers ultimately. (DBE 2017: n.p.)

Recommendations from the discussion groups at the colloquium were tabled for consideration by a working group that would subsequently devise the standards. All attendees were invited to express their interest in being part of a working group to develop the standards. A working group of 14 stakeholders was constituted by the DHET and mandated with the responsibility of delivering a set of standards for inclusive teaching over the following six months. Phase Two involved a day-long meeting of the standards development working group, where five dimensions of inclusive teaching were identified as first-order categories for framing the standards. Phase Three was a two-day meeting during which the dimensions were described, with subdimensions and standards for beginner teachers developed for each. The work was then presented to the wider SACE team working on the broader project of developing standards for professional teaching in the South African context. The purpose of this article is not to evaluate the product of these processes, that is, the standards themselves, but to inquire into the discussions that generated the standards. Doing so led us to identify a number of dilemmas that the participants had to contend with as they sought and reached consensus through dialogue.

Dilemmas in (inclusive) education

Dilemmas capture something of the complexity of education (Berlak & Berlak 1981; Scager et al. 2017). A dilemma is understood as a necessary choice between two equally valid but mutually incompatible positions. There is always risk or negative consequence (Norwich 2010) associated with resolution on one or other side of the dilemma. The very nature of teaching is said to be dilemmatic, contradictory and paradoxical as teachers balance competing demands in their classrooms (Scager et al. 2017). Dilemmas, according to Berlak and Berlak (1981: 111), are 'linguistic constructions that, like lenses, may be used to focus upon the continuous process of persons acting in the social world.' These authors explain that the language of dilemmas 'captures contradictions that are simultaneously in consciousness and society' (ibid.: 124). Various scholars

have identified and categorised dilemmas in education (see, for example, Berlak & Berlak 1981; Judge 1981), and dilemmas have become a focal point for scholars in special and inclusive education.

Our interest in dilemma analysis is provoked by the idea that standards for teaching are not neutral – they are produced in a particular social context, and reflect a set of power relations (Mulcahy 2011). A set of published standards appears as a completed artefact and the contests and tensions in its assemblage are usually invisible. Our interest is in the process of encountering and resolving the inevitable dilemmas that arise both from the inherent tensions in the field of inclusive education and from the different stakeholder imperatives, priorities, experiences and perspectives. These differences necessitate that participants in the working groups exercise a 'professionally appropriate perception of what is salient' (Morrow 2007: 80), an understanding of others' positions through dialogue, and a willingness to reach consensus.

Dilemmas offer a useful lens for analysis. Berlak and Berlak (1981: 233) say that they developed their framework for 'practical inquiry' in education. Norwich (2008, 2010) has used the ideas of the recognition and resolution of dilemmas in cross-national explorations of special and inclusive education. Norwich (2008: 32) identifies several dilemmas in relation to special needs and inclusive education. These dilemmas relate to issues of curriculum (whether children with disabilities should learn the same or different content), identification (whether children should be identified as requiring special provisions), parent and professional influence (the extent to which parents and professionals can exercise power in decisions), and place (whether children with disabilities should learn in regular classrooms). Ethical dilemmas around resources, assessment and interventions are foregrounded in special education (see, for example, Berkeley & Ludlow 2008; Stockall & Dennis 2015; Scager et al. 2017). Michailakis and Reich (2009) find dilemmas to be a useful way to describe tensions in inclusive education between different levels of the education system – from the macro system, to the organisation, and to the classroom. Costley (1997) used dilemmas to analyse teachers' responses to curriculum frameworks when teaching pupils with moderate learning difficulties. Given the generative nature of dilemma analysis, we deemed it an appropriate framework for analysing the tensions that arose during the standards generation process. We contribute to the scholarship of dilemma analysis with the use of the 'will to consensus' (Wiredu 1996: 183) as a means to understand the resolution of dilemmas within conversations among professionals.

Wiredu (1995: 53) observes how 'decision making in traditional African life and governance was, as a rule, by consensus.' In using dialogue to reach a consensus position, Wiredu argues that all parties are able to feel that 'adequate account has been taken of their points of view' without necessarily reaching a point of total agreement (1995: 54). The will to consensus 'presupposes an original position of diversity' and through the will to reach consensus, dialogue can lead to a 'willing suspension of disagreement, making possible agreed actions without necessarily agreed notions' (ibid.). Reaching a consensus position requires the willingness to lay aside personal interest to advance a common project (Wiredu 1996). We believe that Wiredu's concept is an

appropriate lens for understanding the generation of standards for inclusive teaching in the South African context given that a group of diverse stakeholders were brought together and tasked with a common goal. Extensive dialogue and the will to consensus were needed from all parties in order to reach a negotiated, and broadly accepted, product through the processes.

Research design and methodology

The inclusive teaching standards generation process included a qualitative research project that aimed to secure a record, and deeper understanding, of the processes involved in devising the standards. To this end, and with ethics approval from the university and permission from the DHET, the stakeholders involved in the deliberations were invited to participate in the research by allowing their contributions to be audio recorded. Assurances of anonymity and the right to withdraw were given. We collected no biographical data on participants because this may have raised concerns about anonymity, and we were interested in the group deliberations rather than tracking individual contributions. Discussion groups that included any member who did not want to participate were not recorded. Each discussion group was constituted of 10–15 people. In Phase One, there were two sessions and five group discussions. In Phase Two, there were three sessions with one group and, in Phase Three, there were six sessions and one group. Fourteen conversations, lasting between 90 and 150 minutes were audio recorded and transcribed for analysis. We conducted an initial thematic analysis of the data in which codes were assigned to segments of conversation, and these codes were then clustered into categories (Robson 2011). These categories attested to participants' engagement with a wide range of topics related to the elements of inclusive education (UNESCO 2018) that preservice teachers could be expected to know about. These elements included the following: theory, legislation and policy; schools; curriculum and pedagogy; personnel (teachers, school leaders and other specialist and support personnel); and communities (contexts, parents/caregivers and learners). We then approached these data to answer two questions:

- What dilemmas are embedded in the deliberations?
- How were the dilemmas resolved?

A key decision in analysis was to determine what constituted a dilemma. In other words, not all disagreements reflect dilemmas. We took dilemmas to be those contradictions in which resolution on one or other side would have a significant impact on the process or the product of the deliberations. We also decided that the dilemmas needed to be evident across at least two phases of the process, such that they could be seen to represent an ongoing tension. Finally, we took dilemmas as those issues that could be described at a level of abstraction.

The authors of this article disclose their involvement in the processes described above. Walton was a member of the inclusive teaching standards working group, and was present at all three phases as a participant observer. This meant being immersed in the process while also having a research interest. The advantage of this is an appreciation of the context of the discussions (Bryman 2012)

and insider knowledge of the issues raised. The disadvantage is the possibility of bringing preconceived ideas to data analysis and not having sufficient distance from the process to be objective. This was mitigated by the involvement of Rusznyak, who took part in the broader SACE Professional Teaching Standards generation process but not the inclusive teaching part. Rusznyak brought a sensitivity to the topic through knowledge of the overall aims of the processes and was able to offer inter-rater reliability in coding and analysing the data. Other measures that ensured the quality of the findings were the use of an external transcriber, who provided the researchers with anonymised transcripts, and creating distance by only beginning analysis a full year after the final meetings. We have, where appropriate, provided extended extracts from the data in support of our findings, noting that we have made grammatical changes to some extracts to enhance readability.

Findings and discussion

This section describes four dilemmas that emerged in the group deliberations and relates each to the wider literature. The resolution of each dilemma is mentioned. We present the dilemmas roughly in a time sequence in that the first dilemma had to be resolved before the second, and the second before the third. Then, we suggest the notion of consensus within an African philosophy, and the exercise of professional judgement to explain how the participants were able to move on from seemingly entrenched positions on one or other side of a dilemma to produce the final document.

Dilemma 1: Inclusive teaching – ‘everyone’s business’ versus ‘our specialised knowledge’

In Phase One of the process, participants grappled with whether standards for inclusive teaching should be described apart from the more general professional teaching standards that would be applicable for all teachers. On one hand, strong arguments were made for not having a set of separate standards for inclusive teaching. The reasons given by one participant were that ‘social justice and inclusivity’ would appear to be ‘added on’ when, in fact, ‘values should permeate all these other domains, subject competences [and] interpreting curricula.’ Another participant suggested that having a separate description of inclusive teaching implied that ‘you can choose not to be [an inclusive teacher].’ The South African Constitution was invoked as this participant continued: ‘And how do we then uphold our Constitution that this is a right for marginalised children if we are creating a space in which you have a choice?’ Inclusive teaching, in this view, is ‘responding to diversity in a classroom and all teachers should be doing it.’ In other words, inclusion is ‘everybody’s business’ and thus shouldn’t be described separately from professional teaching standards more generally.

On the other hand, participants were concerned that, without standards dedicated to inclusive teaching, inclusivity could be marginalised. As one participant explained: ‘The conventional way of looking at teaching is not necessarily an inclusive way of teaching. And so to just create standards around the conventional way we view teaching, almost marginalises inclusion in that

debate.' Another participant argued that 'we need to put disability in more consciously … to ensure that that inclusivity is manifested and delivered.' This participant elaborated the point using an example of a school that is 'technically inclusive, those children are there. They're fulfilling the mandate of our Constitution. They are not unlawful. But they are not prepared. And those children, as a result, are not safe.' This suggests that while a school might be structurally inclusive, the teaching might not be. Another participant saw the need for discrete standards for inclusive teaching, not as the ideal, but as a requirement for 'teachers who are new and who are novice.' This point was developed by another participant who saw value in describing 'what are we looking at in an inclusive teacher' as a means to 'inform initial teacher education [and] to be able to inform continuous professional development.' For these reasons, the visibility of a separate set of standards for inclusive teaching was deemed valuable.

This dilemma arising from the relationship between professional and inclusive teaching is not unique to the development of standards in the South African context. Internationally, we see this dilemma manifest in how inclusive teaching is positioned within, or separated from, general standards set for teaching. Different approaches are apparent, and two positions will be briefly mentioned. The first approach describes general standards for teaching and has an additional document that gives an in-depth account of the knowledge and skills demanded by inclusive education. Scotland, for example, has a set of general professional standards developed by the General Teaching Council for Scotland for teachers at different stages of their career. In addition, there is a National Framework for Inclusion (Scotland Teacher Education Committee 2014: 4) that 'identifies the values and beliefs, the professional knowledge and understanding, and the professional skills and abilities, in terms of inclusive education, to be expected of student teachers and of qualified teachers at whatever stage of their career.' A second approach is where standards that address inclusive education are a part of the broader professional teaching standards. England, for example, devotes one of its English Teachers' Standards (Department for Education 2011) to teachers' pedagogical responsiveness to diverse learners. There is no additional framework that provides detailed expectations for inclusive teaching in this system, but the one embedded standard signals the expectation that all teachers know about, and respond to, learner diversity.

The dilemma of whether to infuse inclusive education into the broader professional teaching standards (developed by the SACE) or to establish a stand-alone set was largely resolved by the external mandate to generate standards that inform the development of courses in inclusive education within ITE. So, a discrete set of standards had to be produced. However, the inclusive education standards working group was given opportunities to engage with a draft set of professional teaching standards. These opportunities ensured that principles of inclusive teaching were intentionally embedded in the broader set of national professional teaching standards developed by SACE. The form of the standards and the relationship between the broad ones and the focused ones was therefore resolved. However, in Phase Two of the process, this dilemma expressed itself somewhat differently during the deliberations.

Once the process of standards development began, participants found it quite difficult to

demarcate aspects of teaching that could be regarded as the purview of inclusive education. After a brainstorming session in which participants contributed characteristics of inclusive teaching, one said: 'These standards could end up being standards which are going to be a bit too much to handle. So I think at some point we're going to have to be a bit disciplined about not putting everything into this, you know.' Another participant agreed, saying:

> So because otherwise we're going to end up replicating what they [the SACE group working on general professional teaching standards] are doing and we're going to be exhausted in the process. But if we were to say … you know what, that's our stuff, which if we don't flesh out … the big group is likely to lose.

This participant presented the idea of 'our specialist knowledge' to signal the specific contribution that the inclusive education working group brought to the standards generation process. This challenge of finding the specialist knowledge of inclusive education continued through to Phase Three. Discussion took place about the inclusion of the ideas of reflective practice and continual professional development. One participant reminded the others that 'we are doing the inclusive things' saying, 'I guess I'm also thinking what we must do that the others wouldn't think of.' In resolving this dilemma, we see participants pushed to interrogate and articulate their specialist knowledge and perspective. They needed to identify a distinct boundary between their own mandate and the terrain of others working on professional teaching standards.

Dilemma 2: Defining inclusive education – diversity versus disability?

The dilemma identified from the deliberations is a contest about the definition of inclusive education – whether it should focus on all learners vulnerable to marginalisation and exclusion, or whether it is specifically an issue of disability. But before exploring this, we found an interesting sub-dilemma embedded within the dilemma. Framed explicitly as a dilemma by one of the participants in Session Two of Phase Two, it is expressed as follows: Standards for inclusive teaching cannot be described without a shared understanding of what is meant by inclusive education; the converse is that in developing the standards, the necessary definitional work would be done. This extended extract is illustrative:

> **Participant (P)9**: So what I suspect is going to happen … is it will end up being iterative, that as we start talking about what we'd like to see – whether we call them standards, indicators, something … we're actually going to almost work backwards and clarify understandings. So I think it's … almost a dilemma … if we're not working with the shared understanding, will we get anywhere?
>
> **P2**: Yes.
>
> **P9**: You know, and I think there is some concern that maybe we won't. But on the other hand then it's through the working together that I think those understandings emerge and … I suspect just listening to us, probably we've got enough to kind of stumble along with.

The participants did not pause the deliberations to settle on a definition of inclusive education and proceeded to 'stumble along.' This is significant in the resolution of a dilemma where there is tacit acknowledgement of the need for a consensus position, and where not all stakeholders will be fully

satisfied with an outcome, but all can regard a consensus position as tolerable in the light of competing and incompatible positions. But the wider dilemma of how explicitly disability should feature was given extensive consideration.

One participant described this dilemma with reference to a higher education institution, saying: 'So that, that brings a dilemma now. Like the institution that we are talking about, they are looking at disability specifically, but then at the same time we are clamouring for inclusive education – so where are we going?' On one hand, there were participants who rejected the link between inclusive education and special needs. Taking issue with South Africa's policy, one participant said: 'White Paper 6 which is our primary policy on inclusive education, still talks about building a special needs education system.' Continuing the thought, this participant said: 'I don't think it is a problem to have discussion and debate about what inclusive education is, but when it is so radically seen as about disability, that is a problem.' The concern with the many ways in which South African learners have been (and continue to be) excluded from schooling was a refrain throughout the discussions. A participant in Phase Two identified excluded identities that s/he wanted acknowledged by saying:

> It's not only about learners with special needs and so on, but it's also about those learners in mainstream classrooms that are excluded. I exclude you because of language, I exclude you because of religion, I exclude you because I look at you as a person without any culture, you are a-cultural. So I'm not including you. You don't feel welcome there because nothing is said about your culture, nothing is said about your religion, nothing is said about maybe what – the context, your context.

This extract reveals a concern that exclusion operates as the non-recognition of diverse language, religion and culture, and an argument that the standards had to incorporate this recognition. The views of these participants reflect what is known as a broad view of inclusive education. This broad view brings all children vulnerable to exclusion into the scope of inclusive education (UNESCO 2018). However, in broadening the definition of inclusive education by focusing on a range of excluded identities, there is a risk that disability is marginalised.

The narrower view of inclusive education argues for the focus to remain on the inclusion of disabled children, particularly since these are the most marginalised children in the world (Croft 2013). This narrower view was held by some participants in the standards generation discussion. They wanted issues of disability to be foregrounded in the standards document. One participant raised concern with the broad approach to inclusion that is said to exclude those concerned with disability:

> And then I think the disability community will push back and say you are getting excluded from inclusion now. Like, it's just like, this is a disability? No, it's not. And … I spend a lot of time with the DSD [Department of Social Development] and those groups, and they feel excluded by inclusive education.

Others pressed for reference to disability to be made specific within a broader consideration of 'learner diversity' in the standards. They wanted explicit mention of 'the broad knowledge of

disability and some specifics,' and for the word 'disability' to be included with notions of child development and human rights.

The dilemma is that by foregrounding disability, the standards could miss many other ways in which learners are excluded. But, a more generic approach to diversity risks marginalising disability issues all over again. This dilemma reflects concerns in Miles and Singal's (2010) debate between Education for All and Inclusive Education. These authors discuss the impact of the invisibility of disability in 'education for all rhetoric,' but also show how focus on access for individuals or groups can detract attention from focusing on overall systemic change. They conclude that 'while many in the field argue that there needs to be a focus on "all," there is arguably still a need for a particular focus on disability issues – sometimes called a "twin-track" approach' (Miles & Singal 2010: 11). Somewhat pessimistically, these authors suggest that it is impossible to find common ground on this issue. The participants in the working group did reach consensus through the resolution of Dilemma 4 (see below: General responsiveness vs individual support) and the term 'disability' does not appear in the standards.

Dilemma 3: De/colonial inclusive education

The primacy of context is the issue at the heart of this dilemma. It emerged in Phase Two as participants in the process looked for precedent in international standards for inclusive teaching, while trying to ensure relevance to the contextual realities of South Africa. A key point of contention was whether to start with context and work towards describing applicable standards, or whether to start with exemplars from elsewhere (such as Scotland and England, mentioned above), and then seek contextual relevance. One participant argued for looking 'from an Afro-centric perspective in the context of South Africa in such development of the standards if we are to respond, if we are to develop standards that are in alignment with our pragmatic realities.' This was seen by another participant as a 'bottom-up' approach, in contrast to a 'top-down approach' that would look at existing standards in other countries. One participant gave support to the bottom-up approach, arguing that the team 'should start with the practical realities of South Africa and that's the first thing that we should be interrogating.' Others favoured seeing 'what is out there.'

To enable progress, this dilemma was resolved through the chair's mandate to the group to get a sense of 'what's happening out there. We take that, we look at it and we then begin the process using that Afro-centric approach – what we can use, what we can't, how we're going to change it.' As the discussion about various international models progressed, with group members suggesting aspects of inclusive teaching that should be reflected in the standards, the following interchange took place:

P2: What about ICT?

P19: Decolonised.

P9: You've got?

P19: Decolonised inclusive education.

P2: Decolonise inclusive education? [Some participants chuckle]

P23: I'm writing it!

P19: Teaching for social justice.

The idea of decolonised inclusive education shifted the conversation to a focus on the need to describe inclusive teaching that was anchored in the South African experience. One participant was concerned to foreground 'the structural and environmental barriers that's part of the South African context. Like it's like a whole other thing that South African teachers have to contend with more than a lot of other countries.' There was a sense that there are issues in South Africa that are not covered in global descriptions of the competences of inclusive teachers. These issues are defined by one participant as 'around … social justice and intercultural competence,' which are seen as being 'a whole other layer that teachers need to address' in South Africa. Another participant was concerned to find a domain of teacher competence where the standards would 'unpack all of your very South African relevant barriers to learning.' Here, the dilemma resolution was through the intertwining of both global and local as participants moved iteratively between ideas raised in the international models and those specifically relating to the South African context.

The challenge of balancing contextual specificity and generality continued into Phase Three of the process. The dilemma is evident in that a choice towards too much specificity loses relevance for those outside the immediate context, but too much generality 'could mean anything.' The following extract is from a discussion on what it might mean for a standard to say: 'Understanding barriers of learning and development in the South African context.'

P9: That then opens, for example, is that possibly in your universities you might need to be spending more time on the foetal alcohol syndrome issues because that's a, quite a big thing there ...

P26: Yes.

P9: ... but not necessarily in our areas where teachers may need to be aware of it but … So that also even opens up the possibility for quite contextually specific responses, I don't know. Is that what you're thinking?

P30: Yes, and we are not only training teachers for South Africa.

P29: That's what I wanted to mention.

P30: We usually miss out on our colleagues from Lesotho, from Swaziland.

P29: Yes.

P30: We teach them the South African context as if they were going to go back and work there.

P26: Yes, but that's why I want it to be Southern African context.

P30: Okay.

P29: That's what I wanted, also to say that.

> **P26**: Because if we just say 'in context' it could mean anything and especially people like me who are still so tied to northern hemisphere things.

This conversation captures the advantage that a general statement offers the flexibility for an individual university to explore location-specific barriers to learning, in this case, foetal alcohol syndrome, which is more prevalent in some parts of South Africa than others. The limitation to South Africa is challenged, with the acknowledgement of students from different parts of Southern Africa. At the same time, some regional grounding is emphasised so that 'northern hemisphere things' do not prevail.

Standards for teaching generally are problematic in that they represent an 'abstract discourse' that is inevitably at variance with 'the particular experiences of teachers' (Kostogriz 2018: 245). This tension is also prevalent in inclusive education, which has a supranational discourse (through the UNCRPD, UNESCO, Sustainable Development Goals, etc.) and local instantiations. The potential conflict between the global abstraction and the local instantiation is well documented in the literature in the field (Kalyanpur 2016; Muthukrishna & Engelbrecht 2018), and it is widely conceded that local histories and geographies of exclusion will shape inclusive education in different contexts (Kozleski, Artiles & Waitoller 2011).

Dilemma 4: General responsiveness to difference versus individualised support

A well-known dilemma in special and inclusive education manifested itself in the deliberations of the standards working group. Derived from the work of Minnow (1990, cited in Norwich 2008), the 'dilemma of difference' concerns the implications of treating everyone the same (and so, not providing the support that individuals may require) versus treating everyone as different (and risking marginalisation and stigmatisation). Dyson and Howes (2009: 156) express this as the 'dilemma of how to respond simultaneously to differences and commonalities between learners.' One of the participants in Phase Three of the process expressed this as the 'distinction between the kind of what we do for everyone versus the specific interventions for some.' On one hand, there were participants who recommended that the standards should emphasise knowledge of the effective use of general teaching strategies. One participant expressed this as

> teachers having a toolkit where they can just pull on different things based on what they are finding as they are going along. So you would want to give them a kind of bag of goodies that they are taking to the classroom.

This view was emphasised as being congruent with the focus on beginner teachers, and the recognition that ITE could not provide information about all the learning needs that prospective teachers might encounter. A participant said: 'We can't load initial teacher education with everything that we know that inclusive teachers need because that ends up being pretty impossible.' The work of Lani Florian (2014, 2015), who had been a plenary speaker in Phase One, was influential in this discussion. The concern was raised by participants that the standards did not reinforce 'bell curve thinking' but that inclusive teachers should 'hold high expectations for all learners.'

On the other hand, the concern was raised that a general pedagogical responsiveness to diversity in the standards was insufficient. One participant disagreed with the toolkit idea, saying

> I disagree because sometimes children do need very specific intervention depending on where they're at and what their need is. So I think we can be generalist to a point but in order to really, honestly, authentically move that child forward, you have to be with where that particular child is at.

Another participant argued for a focus on 'individual support' for 'identified groups of learners like … additional language learners or learners who struggled with concentration.' Suggesting wording that would be used in the final document, someone else wanted to shift the language of support to a more asset-based approach. This participant said: 'I was thinking shouldn't we change the wording of "individual support, planning and intervention" to "addressing individual strengths and needs"?' The focus here remains on an approach that secures the visibility of the individual learner or identified group in the standards.

This dilemma is expressed in the fields of inclusive and special education with debates about whether disabled children require pedagogies specific to their disability classification (see for example, Cook & Schirmer 2003; Lewis & Norwich 2005; Croft 2013). Florian and Black-Hawkins promote the idea of an inclusive pedagogy that focuses on everyone in the classroom, arguing for an extension of 'what is ordinarily available for all learners (creating a rich learning community) rather than using teaching and learning strategies that are suitable for most alongside something "additional" or "different" for some who experience difficulties' (2011: 818).

The dilemma was resolved in the standards document not on one or other side, but by having a focus on both. The third dimension of inclusive teaching was described in the standards as 'Classroom practices that promote and support collaborative and individual learning,' with two subdimensions. The first subdimension reflects the influence of Florian's (2015) inclusive pedagogical approach with the words: 'Classroom strategies that are pedagogically designed to be responsive to learner diversity.' The second subdimension, 'Individual asset-based support,' satisfied those who wanted to secure a focus on individually tailored pedagogy. This resolution, in effect, also resolved the second dilemma given that the specific needs of individuals (possibly with disabilities) were seen to be addressed.

Discussion: Dilemma resolution

We return to the concern that scholarly discussions of teaching standards neglect the human processes that produce them (Mulcahy 2011). We understand the resolution of the identified dilemmas through the African philosopher, Kwasi Wiredu's, idea of consensus. The members of the discussion groups in Phases Two and Three embodied the 'will to consensus' (Wiredu 1996: 183) in both the process and the product of the deliberations. Some dilemmas, like whether to have separate standards for inclusive teaching, were resolved by settling on one side in favour of the other. In these instances, because of the impetus of the task at hand and the desire to 'avoid immobilisation,' group members who had different ideas were able to 'prune down their

reservations' in pursuit of 'the common necessity for something to be done' (Wiredu 2010: 1057). Other dilemmas, like defining inclusive education in terms of general diversity or disability, were resolved by what Wiredu calls 'smoothing of edges' in which dialogue brought about 'compromises that are agreeable to all or, at least, not obnoxious to any' (1996: 183). In some cases, participants did not stick in an unyielding way to their preferred position but, rather, made certain concessions and moved towards a common consensus position that they did not find untenable.

The ability and willingness to seek consensus required that participants draw on their professional knowledge to make reasoned judgements in the complexities of the standards generating process. The resolution of dilemmas encountered during the deliberations required that consensus be reached if the artefact of the standards was to be, if not widely accepted then, widely acceptable to different stakeholder interests. Reaching such a consensus position required the participants to exercise professional judgement in the deliberation processes. This judgement draws on both theoretical knowledge and complex practical experience (Shalem 2014). Participants needed to be able to hold onto the overall mandate of the standards development working group while representing their own theoretical and ideological positions, and ensuring that the views of their stakeholder constituencies were considered. The exercising of professional judgement required them to consider the perspectives of different positions through dialogue, that is, engage in a 'situational appreciation' (Morrow 2007: 80) of what is salient in particular situations, and concede aspects that enabled the imperatives of other stakeholders to be reflected in the resulting standards. For this process to generate a coherent and owned set of standards, the consensus could not be one of dominant personalities and interest groups but, rather, one of careful and considered engagement with a complex set of issues from different perspectives.

Conclusion

This dilemma analysis has highlighted three issues that we believe are significant for inclusive education and teacher education in South Africa. First, the South African context is complex, and the standards reflect a codified but abstracted vision of inclusive teaching. Teacher education has an important role to play in mediating the standards and enabling their performance in practice. Second, while the standards might be abstract, they represent a very real process of human actors, all with their own interests and positions, working together to produce an acceptable document in a relatively short period of time. The dilemmas encountered were resolved in different ways within an overall will to consensus through engaged dialogue by diverse stakeholders. Finally, while South Africa faces unique challenges to inclusive education as a result of its colonial and apartheid past, it is also grappling with common concerns. Therefore, the knowledges produced in this Global South context can and should contribute to the international discourse community in the field.

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Inclusive education as a localised project in complex contexts: A South African case study

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Abstract

This paper focuses on how school leaders (including members of school management and teachers) at a rural full-service school establish enabling inclusive structures, and how professional judgement is shaped by complex happenings in this particular context. Complexity theory is used as the theoretical framework to facilitate the description and interpretation of what is happening at this school, and to explain how the knowledge, sense-making and professional judgement of school leaders evolve in the development of inclusive education practices, processes and outcomes. Our discussion demonstrates that this particular full-service school is a complex adaptive open system, with actors and agents who are actively interacting with their environment and engaging with the intricacies of inclusive education policy implementation. By using complexity theory to describe and interpret the inclusive education enactments in this school, the shift from traditional top-down forms of leadership is illustrated – as well as the emerging innovative practices that draw on the strengths and capabilities in the school context. With specific reference to professional judgement in this complex context, staff not only draw on situated knowledge in setting priorities, making decisions and planning actions, but also take part in collectively initiated professional development opportunities, to further develop theoretical and disciplinary knowledge, to inform their judgements and action in practice.

Keywords: inclusive education, complexity theory, complexity science, professional judgement, full-service schools

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Introduction

In South Africa, inclusive education has evolved as a human rights and social justice agenda that endeavours to challenge exclusionary policies and practices in the education system. Inclusive education policy is centrally located in international declarations and other imperatives including the agenda of Education for All, the Millennium Development Goals (United Nations 2010), the Convention on the Rights of the Child (United Nations 1989), the Convention on the Rights of Persons with Disabilities (United Nations 2006) and in South African policies and legislation that have emerged since 1994. Section 29(1)(a) of the Constitution of the Republic of South Africa, 1996 states that everyone has the right to education, including adult education (Republic of South Africa 1996a). Inclusion in education in South Africa is therefore essentially about equity, access to and full participation in education, and quality learning for all. Protection against oppression based on culture, language, gender, race, sexual orientation, ethnicity, ability/disability, or any other form of difference is an inalienable human right that must be valued and promoted by education systems. In addition, the South African Schools Act (Republic of South Africa 1996b) legislated that public schools must admit all learners, and must be responsive to their educational needs, without any unfair discrimination.

In July 2001, the South African government released the policy framework, Education White Paper 6 – Special Needs Education: Building an Inclusive Education and Training System (Department of Education 2001). To address the inequalities in education entrenched during the apartheid era, Education White Paper 6 proposed that the entire education system be transformed to an inclusive one – so that all learners can access education and training, no matter what individual support needs they may have. This imperative links directly to the Sustainable Development Goals, particularly Goal 4 and its commitment to achieve inclusive and quality education for all (United Nations 2015). The underlying commitment in Education White Paper 6 is to establish an inclusive education and training system and, at the same time, to transform the system so that learners experiencing barriers to learning can be identified early in their schooling, and appropriate support be provided.

Research studies on the implementation of inclusive education after the publication of Education White Paper 6 have reported inconsistent and often contradictory implementations of this policy and continued reliance on traditional linear-causal implementation strategies developed in high-income countries, including the identification of specific causes for specific challenges of, for example, learners with disabilities (Engelbrecht & Green 2018; Muthukrishna & Engelbrecht 2018). Despite the development of specific implementation guidelines since 2007 (e.g., Department of Education 2007; Department of Basic Education 2010, 2014), complex contextual issues such as funding constraints that affect the availability of resources in specific areas, resultant overcrowded classrooms, and negative school cultures with specific reference to those who are regarded as ‘different’ have complicated implementation of the guidelines, which tend to be rather linear in nature (Ngcobo & Muthukrishna 2011; Walton 2016; Muthukrishna & Engelbrecht 2018). Teachers’ need for additional training, as reported in these studies, therefore

justifies the need for sound professional training so they can build the self-confidence and cognitive flexibility to develop innovative localised approaches (Ngcobo & Muthukrishna 2011; Donohue & Bornman 2014; Engelbrecht et al. 2015; Engelbrecht et al. 2017). Furthermore, as pointed out by Engelbrecht et al. (2017), a restrictive approach to teacher autonomy (for example, teachers report that subject advisors at most district offices are prescriptive on how they should implement policy as well as the curriculum) has led to uncertainty among teachers about their ability to develop innovative localised approaches to implement policy guidelines and adapt the curriculum. Walton (2016: 76) warns that, in many inclusive education enactments, 'the system does not change, it is just rearranged.' We believe that the focus should, therefore, rather be on the way inclusive education is embedded in varied and complex localised cultural, societal and historical contexts. As a result, the professional judgement of teachers, and the style of the school leadership in respect of the priorities they set and to which they commit, are not only based on theoretical knowledge but are also shaped by situated influences.

Education White Paper 6 outlines six strategies for establishing an inclusive education and training system, and for transforming the system so that learners experiencing barriers to learning can be identified early in their schooling and be provided with appropriate support. These strategies are the following:

- implementation of a national advocacy and information programme in support of the inclusion model;
- qualitative improvement of special schools for the learners they serve, and their conversion to resource centres;
- establishment of district-based support teams to provide coordinated support services to all schools;
- general orientation and introduction of management, governing bodies and professional staff to inclusive education;
- mobilisation of approximately 280,000 children and youth of compulsory school-going age who are out of school; and
- designation and conversion of approximately 500 mainstream primary schools to full-service schools that are not a separate category of public school (Department of Education 2001).

The full-service school is intended to offer coordinated provision of support and be responsive to a wide range of learning needs. The publication, Guidelines for Full-Service/Inclusive Schools (Department of Basic Education 2010), conceptualises a full-service school as a mainstream school that provides education for all learners by meeting the full range of learning needs. The school enables access to education for all learners residing in the catchment area of the school, whatever their learning needs. The school commits to creating a welcoming and accepting environment, development of an inclusive pedagogy, and to providing a wide range of support to accommodate diverse learner needs and enable meaningful participation. In this paper, we present

a qualitative case study of a full-service school in the province of KwaZulu-Natal, South Africa.

The key research questions in the study were 'How do teachers, including school management, at a rural full-service school establish enabling structures and systems to build an inclusive learning and teaching context?' and 'How is professional judgement shaped by complex happenings in the particular situated context of the rural full-service school?'

Theoretical considerations

In this paper, we consider how complexity theory, or complexity science, as a theoretical framework could open up new questions, provide us with new spaces to explore explanations and offer new ways of making sense of the knowledge and the agency of school leaders (including teachers) in the development of inclusive education practices, processes and outcomes in full-service schools. Complexity science provides a framework for examining complex adaptive systems such as education systems and institutions – emphasising the patterns and relationships that exist within the parts in order to understand the system and the people working in it (Brown 2012). Complexity science centres on aspects of systems that are ignored by traditional approaches based on Newtonian scientific principles that suggest it is possible to examine and gain an understanding of simple universal rules that regulate system parts (Cilliers 1998; Cochran-Smith et al. 2014). The traditional view is that the workings of the parts are predictable and can be understood in a linear cause-and-effect manner. In contrast, according to complexity theory, systems and organisations such as schools are situated in networks of multifaceted adaptive groups of agents and actors that engage with each other, learn and adapt. To illustrate, individuals can be viewed as adaptive agents in the political system and, schools, as adaptive agents in the education system. Agents perform in response to local knowledge and situated encounters and understandings, and they interact with each other as they adapt, learn and change. From a complexity science perspective, each institution is viewed as part of a complex and connected arrangement of interacting agents located in overarching networks or systems such as a political, social or economic system (Trombly 2014).

Complexity theory introduces the concept of organisations and institutions being complex adaptive systems (Uhl-Bien, Marion & McKelvey 2007). The theory suggests that rather than reflecting stability and symmetry, complex systems continually evolve and transform. They are dynamic, emergent and self-organising (Mason 2009). Change is a key property of complex adaptive systems. Complex adaptive systems are adaptable and innovative. They accept complexity and evolve continually, and they take up the challenge of adapting to a changing environment. Complexity science therefore offers a way of moving beyond the limits of reductionism, which seeks to understand the world in a simple linear or mechanistic way. The world, in reality, comprises organic and holistic systems that are difficult to make sense of through traditional scientific analysis. Thus, complexity science offers a framework for examining the patterns and relationships among the parts of complex adaptive systems, and for illuminating the unpredictable dimensions of engaging with agents and actors in dynamic organisations and

institutions (Uhl-Bien et al. 2007; Mason 2009).

This framework is also relevant for the school system given that educators in the past 20 years have increasingly started to use the modifier 'complex' to describe the 'inadequacy and difficulty of current conceptions of educational practice to fully account for the unanticipated and unpredictable nature of teaching and learning that are inherently a part of the daily practice of schools and schooling' (Clarke & Collins 2007: 162). Researchers have increasingly sought alternative ways to understand and describe the complexity of schooling and, as a result, there has been a shift towards complexity theory to describe school systems as representing complex phenomena (Morrison 2006; Clarke & Collins 2007).

Research design and methodology

The qualitative case study presented in this paper was part of a larger study titled, *South Africa Case Study. A North–South Partner-Driven Co-operation Project: Teaching for Inclusion and Democracy* (MiETAfrica 2014). The aim was to explore the particularity of a case as a unique bounded system, and as a complex entity located in a particular milieu and embedded in a number of settings including historical, social, economic, political and ethical settings (Flyvbjerg 2004; Seale et al. 2004).

The research context was a full-service school, Innova (pseudonym) Primary School, situated in a rural context in KwaZulu-Natal. As explained above, one of the levers for transformation towards an inclusive education and training system in South Africa articulated in Education White Paper 6 is the notion of a full-service school (Department of Basic Education 2010). In 2013, Innova Primary School was designated to serve as a full-service school. The school provides a moderate level of support, and it serves as a resource and referral centre for surrounding schools and communities. It has slightly greater resourcing and staffing than mainstream schools, and is able to address barriers to learning related to moderate physical and intellectual impairments and socioeconomic influences. The provincial Department of Education had built a care and support centre at the school that was intended to be equipped to enable Innova Primary School to fulfil its role as a support structure to other mainstream schools in the district. The school had access to the support of a learning support educator who was part of the district-based support team (DBST). Additional support was provided by the school counsellor from the DBST.

At the time of the study, the Innova full-service school had approximately 1,500 learners from Grade R (preschool) to Grade 7. Because families are from poor socioeconomic backgrounds, it was a no-fee-paying school. However, parents and caregivers made a voluntary donation of R30.00 per year to supplement the school's resources.

There were 41 staff members including teachers, the learning support educator, one teacher assistant, the principal, the deputy principal and heads of departments. There were approximately 270 learners who experienced barriers to learning including learners with physical disability, mild

intellectual disability and hearing impairment. The school had a toilet that was designed to be accessible to people with disabilities. The school had established a school-based support team (SBST), according to guidelines laid down by the Department of Education (Department of Education 2007). The learner support educator coordinated all activities aimed at addressing barriers to learning and participation.

Key participants in the component of the larger study presented in this paper were the school principal, members of the school-based support team and the learning support educator. The members of the school-based support team comprised the principal, heads of departments, the learning support educator and teachers. Sampling was purposive and participation was voluntary, following an informed consent process. Data generation involved in-depth individual interviews, focus group interviews and document analysis. Interviews were digitally recorded and later transcribed.

The transcribed interviews and documents were read and reread several times. During this process, reflective memos were written to make sense of what was significant in the data sets. The next phase of analysis involved identifying and coding themes and sub-themes across the data sets that reflected on the research questions (Braun & Clarke 2006) and, finally, the process entailed theorising the reasons for their predominance, through the lens of complexity theory.

Permission to undertake the study was obtained from the district Department of Education and from the school management team.

Presentation and discussion of the findings

It is important to note that the community context within which the school is situated is complex, and these complexities influence the way staff at the school set priorities and make decisions. Within the wider district, the community is characterised by poverty, unemployment and underdevelopment, which are becoming the greatest barriers to learning in the district. Fundamental economic inequalities and the resultant inadequate physical and human resources play a key role in, and contribute to, the dynamic interaction between contextual challenges and the development of inclusive practices in all the schools in the district. These include large class sizes, inadequate numbers of teaching staff and a shortage of teaching resources, which have a ripple effect on implementation of inclusive education in schools, including the special schools and full-service schools in the district.

The following two themes identified from the data analysis illustrate how the professional judgement and inclusive education enactments of the staff at the school are influenced and shaped by the complexity of the schooling and wider community context within which the staff work. It is important to note that the two themes are not comprised of discrete issues that are completely distinct and separate from each other. Rather, they are dynamically linked at various levels of the system.

Leading change in a complex system

According to the members of the district-based support team (DBST), Innova Primary School was selected for conversion into a full-service school on the grounds that the school leadership, including teachers, already regarded themselves as agents for change by exhibiting their willingness, despite some initial reservations, to being innovative in engaging with the proposals of Education White Paper 6. In Guidelines for Full-Service/Inclusive Schools (Department of Basic Education 2010: 10-11), it is indicated that key criteria for selection should be 'strong leadership and general positive ethos at the school that embrace change, and potential for extended growth and development.'

The data suggests that the leadership at Innova Primary School is an interactive dynamic within the education system, and that it is socially constructed in and from context. The leadership at the school has embraced changes emanating from new policy imperatives that have emerged as a result of Education White Paper 6. School leaders and the rest of the staff have taken the initiative to engage with responding to diversity and working to create an inclusive schooling context. This indicates that the school has been emerging as an adaptive system. One of the teachers explained this as follows:

> Learning is an ongoing, as the new policies come in ... It is just that now ... it is not difficult. It's just taking what is already understood and look at what comes in, and just manage it.

Staff members voiced the importance of being open to change and new learning, and to adapting to new roles and responsibilities. This also points to openness to embracing uncertainty and ambiguity in the journey of professional development and the transitions that may ensue.

Teachers and school management confirmed that a care and support centre had been established at their school. They valued the centre and the emerging policy implementation possibilities through the centre's initiatives:

> We have our care and support centre itself. Our school was identified by the district Department of Education because of the hardworking staff. We were already working with those learners who had barriers to learning, and the district felt that we need to be presented [rewarded] by becoming a full-service school. That was a vast success, because of the staff development workshops that we doing. (Principal, full-service school)

Uhl-Bien et al. (2007) explain that an important feature of complex adaptive systems is self-organisation. Self-organisation is a process by which an organisation that is generally an open system, grows in complexity, produces change without being managed by an outside hierarchical force, and is the result of the interaction between the system and its environment (Cilliers 1998; Uhl-Bien et al. 2007; Gilbert 2015). Adaptive leadership creates spaces that allow for self-organisation and for the further development of non-linear professional judgement in a complex context.

The SBST is an important leadership structure in the school, and it engages collectively with

teachers, neighbouring schools and parents to make sense of policy and build contextual knowledge and understandings of inclusion. Responsibility and authority are shared, and the elements of a participatory democracy (Clarke & Collins 2007) are being established on a continual basis as members of the school community co-evolve together. Teachers are grateful for the dedicated members of the district-based support team, in particular, the learning support educator and the school counsellor with whom they engage. They find their support invaluable. There is also evidence of collective leadership at various levels. In this regard, the principal, teachers, the members of the SBST, the school counsellor, and the learner support educator are working to enhance inclusive practices. The study found that the members of the SBST are agents in the mediation of inclusive education policy on the ground. They had begun sharing their knowledge with other schools in the area by holding workshops on how to address barriers to learning and create more inclusive schools. An SBST member vividly explained how they viewed the notion of 'community' as critical to knowledge sharing:

> We are aware that now as a school we are a community that has to work with other schools and departments, such as the Department of Health, the Department of Social Welfare. Now that we all know that, we all live as cluster, so to speak, now. For example, there is one school here. They want to know ... want to know exactly what an SBST is and what are the functions of SBST. We SBST members had to go there and explain everything to them. We are being used as a resource ... Yes, we can do more though if we get more funding.

The data reflect that staff at the school were building their own contextual knowledge of issues of inclusion and exclusion, shaped by contextual demands. As laid down in Education White Paper 6, among the more recent learner admissions to the school were learners with disabilities who had mild to moderate support needs. However, staff were engaging with who is included and who is excluded in the particular context, and they have made the decision to shift the imperative of inclusion beyond disability issues. The narratives from a focus group interview with SBST members below are indicative of the reflexive stance they take:

> **Participant (P)2**: There's vulnerable children. Some of them are sick and on medication.
>
> **P1**: There's TB, HIV and AIDS, poverty.
>
> **P4**: Because some parents don't hide that 'my child is HIV' because he or she takes their medication. Because sometimes in the morning you will say 'Did you take ... did you take medication ... did you take medication at home?' And the child will say, 'No.' The child is very weak. So we check: 'Did you have breakfast at home?' And, if he or she says 'No' we will try to give him a slice of bread just before we teach. Some parents are open to assistance. They are not shy to say that 'my child is HIV.' We even have children from child-headed houses who need our care.

Substance abuse, for example, is a serious problem in the district. Teachers on the SBST stated that there were even young children at the full-service school who were affected, as well as adolescents who now go to the local high school. In 2018, the learner support educator had a meeting with approximately 26 learners at the high school who had indicated that they needed help with their drug dependence. It was evident from the data that the full-service school values the good

relationship it has with the local high school. The result has been that a substance abuse programme is now being run in collaboration with the South African National Council on Alcoholism and Drug Dependence (SANCA), a non-governmental organisation whose main objective is the prevention and treatment of alcohol and drug dependence.

Analysis of documents revealed that the work of the SBST revolves around three portfolios related to the goal of quality education, which SBST members and teachers had identified collectively through their reflexive engagements: learner support, teacher support, and institutional support. Members of the team are divided into these portfolios so leadership and responsibilities can be distributed. The study revealed that shared distributed leadership is a process staff commit to and value. Clarke and Collins (2007: 163) state that 'complex systems have the capacity to change and alter based on information sent and received at the local level independent of an authorizing or directing agent.'

From the analysis of school documents, individual interviews and focus group interviews, the study found that the school has an ethos that is welcoming and affirming of diversity, and that it recognises learner potential. However, enactments may not always be coherent. For example, two separate transition classes for learners experiencing difficulties in learning were established, which were later discontinued by staff on the basis of their reflexive evaluation of the lack of benefits of these structures in terms of the goal of inclusive and quality education for all. These segregated classes may not be deemed in line with inclusive education policy principles and imperatives for inclusive education. However, the data illustrated that the school has developed and upholds a philosophy underpinned by principles of inclusion, social rights and social justice.

According to the learning support educator, the principal of the school is an excellent hands-on leader. She explained:

> He is passionately committed to providing quality education, inclusive education policy, and creating an inclusive school. He is also passionate about learning and, in fact, teaches a subject – does not just do management work. He attends all workshops run by the SBST and the learning support educator and is very supportive of and active in the work of the SBST.

Every morning, the principal holds a briefing session with all staff members for 30 minutes. Staff members arrive at the school early to be present at these sessions. Issues that emerge are generally related to teacher support, institutional support and learner support raised by staff or the principal. The learning support educator emphasised that the principal encourages staff to be creative, and he allows spaces for continual learning, innovation and change to achieve quality education. Complexity theory distinguishes between *administrative leadership* and *adaptive leadership*. The former refers to formal enactments such as constituting, planning and coordinating activities, and to individual leadership influence. Adaptive leadership is about the collective influence of leaders within and around the institution or organisation. It is more informal and emergent in nature, and it occurs throughout the organisation, from which adaptive outcomes materialise – such as innovation, learning and adaptability (Brown 2012). The findings suggest that, in Innova Primary

School, there is evidence of the emergence of adaptive leadership that is contextual and dynamic in nature, and this is most evident in the work of the leadership structure, namely the SBST.

The teachers, the SBST and the school management adopt a grounded approach to staff development. Staff development occurs once a fortnight, and is run by the teachers. The agency of teachers is reflected in the focus group interview responses below, in response to the issue of who takes the lead in staff development initiatives:

> **P2**: Anyone among us who has the knowledge and perception, and as well the teachers who are not part of the school management team (SMT). If you have the knowledge and the skill in a particular aspect, we allow him or her to develop the teachers. (Member of the school management team)
>
> **P3**: The SBST decides what topics are raised, but teachers normally raise their needs as well, and then we plan according to their needs, and we develop them. (SBST member)

At Innova Primary School, the study revealed that there is continual interaction, communication and exchanging of information between staff members, and learning and adapting behaviours and actions in locally relevant ways. There is a strong sense that there is a willingness to find innovative solutions and to improvise (Clarke & Collins 2007). When the school took on its role as a full-service school, the initial view of staff was that this was an added burden for them, given the plethora of policies that have emerged and the change that has occurred in education since 1994. There clearly was some resistance to the uncertainty of new policy implementation and the implied move away from a traditional linear-causal construction of learners who experience barriers to learning and development in classrooms. Furthermore, the thinking was that the needs of these learners could only be addressed by a highly specialised First World system of support that would include therapists, psychologists and special education teachers. This thinking is entrenched through traditional professional development programmes, including those for initial teacher education and programmes for the training of educational psychologists. Such initiatives tend to remain reactive rather than proactive, and they usually negate the strengths and resources already present in complex contexts (Kitching 2018).

As mentioned earlier, staff development at the school is closely linked to learner support needs, teacher support and institutional priorities. There is shared belief at the school that ongoing staff development is a key priority in the schooling context. In this way, the further development of teachers' professional judgement in teaching derives not only from context-specific experiences (working knowledge) and outdated theoretical knowledge, but also from updated theoretical knowledge (Shalem 2014). Curriculum differentiation is an example of the further development of theoretical knowledge. The SBST and teachers were of the view that curriculum differentiation was a critical pedagogical skill that they needed in order to be responsive to diversity in the learner population. At the time of the study, they were attending a 5-week continuing professional development (CPD) workshop run on Saturdays by a private educational institution. The learning support educator commented on the commitment and enthusiasm of teachers, reflected in the fact that 'there was 100% attendance from teachers.' The focus of the workshop was curriculum differentiation and the publication, National Strategy on Screening, Identification, Assessment and

Support (SIAS): Operational Guidelines (Department of Basic Education 2004. From a complexity science perspective, it is evident that teachers are continually preparing themselves for the unexpected and the unanticipated, and that they allow for new strategies to emerge in the quest to provide quality support (e.g., Clarke & Collins 2007).

Complexity science warns of the disequilibrium that may occur as a result of change, and the importance of accepting 'that which we cannot determine completely in advance' (Clarke & Collins 2007: 169). In this school, attitudes and the nature of teachers' professional judgement have changed over the years as teachers have begun to engage proactively with inclusive education issues and learner support, and they seem to be allowing the complexity of what they are involved in to emerge and to be embracing it. The school has been able to forge stronger links with the community, which the school management and staff clearly value. The community is now more enlightened and aware of risks, vulnerabilities and barriers to learning that their children experience, and it provides support where possible. Often, issues of exclusion are referred to the full-service school by community members. The learning support educator stated that although crime is rife in the community, and many schools are broken into and learning resources stolen, there has never been an incident at the care and support centre at Innova. An SBST member commented, 'It seems the community owns the full-service school.' The full-service school is taking on a participatory leadership role in the district, and is involved in sustainable capacity building around issues of building, and further developing, inclusive schools. It arranges and holds workshops for teachers from other schools in the district according to support needs identified by these schools. Some of these workshops have included issues such as the SIAS, epilepsy, dyslexia, the child abuse protocol, and inclusive education (IE) policies.

The school clearly exhibits the characteristics of a complex open system that interacts on a continual basis with its direct environment, modulating wide-ranging influences (e.g., inclusive education policy and implementation guidelines) by altering or enhancing these influences in a non-linear and innovative way for its unique local context (Cilliers 1998). In this way, the opportunity to network for change by exhibiting networked, rather than hierarchical, structures and opportunities to create feedback loops is created.

Furthermore, complexity theory, when applied to leadership, redirects emphasis from individual leaders to leadership that is collective in nature and that is an organisational phenomenon (Brown 2012). Innova Primary School is emerging as an institution that is a learning organisation and that is knowledge producing with an enabling, creative and adaptive capacity. These are features of complex adaptive systems (Brown 2012).

Networking for change

The non-linear, networked nature of complex adaptive systems makes it possible for information and energy to not only flow from one part of the network to another, but also to be fed back to their

source. This movement enhances collective learning and development (Clarke & Collins 2007). The rate at which the system adapts to changing conditions depends on the rate of information flow through the system or organisation. Furthermore, the system's capacity to adapt is influenced by the degree and quality of connections between the different parts of the system. If elements in a complex system are separated from one another, then the system is slower to adapt and less likely to experience change and development. In a complex institution such as a school, Mason (2009) asserts that the depth and the richness of the connectivity between agents and actors influence progress and development. Furthermore, he points to the significance of the diversity within and between the actors and partners in shaping educational change that is sustainable.

This study found that the staff at Innova Primary School consider the forging of networks and links with agents and actors in the wider community to be vital for sustainable change and development. The learning support educator, the school counsellor and the SBST at the school are committed to building networks and partnerships in the community to access human and social capital to address barriers to learning and exclusionary pressures on learners and their families. The interaction between school and community is rich, and various elements in the system influence and are influenced by other elements. There are various examples of these interactions that are non-linear in nature, and the following examples illustrate this characteristic of a complex system.

The learning support educator is an active member of a large and very active stakeholder forum in the ward. An inter-sectoral collaboration structure, Sukuma Sakhe, has been established and involves Cooperative Governance and Traditional Affairs (COGTA), the municipality, the Department of Health, the Department of Social Development, the South African Social Security Agency (SASSA), the Department of Correctional Services and various other community organisations such as those for the disabled and the aged, a women's organisation, a non-profit organisation (NPO) and eThekwini Municipality Safer Cities. Various issues and cases are discussed at monthly meetings relating to learner, family and community vulnerability and barriers to learning including psychosocial barriers, poverty and underdevelopment, substance abuse, sexuality education, HIV and AIDS (risks, support and disclosure issues), male circumcision and the risks involved, barriers to accessing social grants, and obtaining personal documents such as birth certificates and identity documents. This is part of the initiative of integrated service delivery and bringing services to the community, according to the learning support educator. Researchers' observations at one of the meetings to discuss a disability awareness day suggest that this is a powerful structure in the ward, which is functioning in a dynamic, situated and contextual way. As mentioned, complex adaptive systems exhibit networked structures and also provide for feedback loops. According to Clarke and Collins (2007), these loops offer spaces for learning at multiple local levels and enable the flow of information and communication within a complex system, without a blueprint to dictate what is learnt, when it is learnt, and how it is understood.

An important aspect of the work of the full-service school is support to families and the community at large. The Guidelines for Full-Service/Inclusive Schools (Department of Basic Education 2010) specifically advises that the systemic, multidimensional nature of barriers to

learning needs to be understood. The SBST explained that assessment has to focus on the social context of the lives of learners. Staff strongly believe that they have to be involved in a non-linear way to respond to community needs that impact children's learning, health and well-being:

> We don't cater for the learning only. We need to look at the social part as well. We found that many learners here they do not have birth certificates, and therefore some of them do not receive the child support grants. It could be that parents do not have their identity documents. We as school are organising a service delivery day in September, where we invite all the different departments to come here. Home Affairs will be here, South African Police Services (SAPS), Department of Social Welfare, Department of Health. Those who don't have the IDs can apply, also birth certificates. Those who are sick, the Department of Health will be here to screen them. All those things will happen here. It will be in September – service delivery day. The police will talk to them about, for example, when they are having problems at home what channels they must follow, what must they do. And then they will give them the pamphlets, contact numbers, who to contact in case they have got such and such problem. (Principal and SBST member, full-service school)

School management and teachers stated that the community benefits from the school in numerous ways through their networking. Local businesses are partners with the school. A local business donated water bottles for every child in the school in support of the school's Save Water initiative. A teacher summarised the belief of staff:

> If we do not work with the community, we cannot address barriers to learning and development, in particular poverty alleviation.

Furthermore, the full-service school was, for example, involved in an initiative to facilitate the establishment of cooperatives, or collective ownership schemes. Cooperatives are an alternative model for the implementation of sustainable community-based initiatives, especially in communities where poverty and unemployment are the greatest barriers to development. Government actively advocates this model for social upliftment projects. In reality, many of these cooperatives have not been sustainable in the long term. At Innova, workshops have been facilitated in the community, drawing on resource persons from the Department of Agriculture to provide people in the community with skills and knowledge related to vegetable farming, poultry, sewing, beadwork, making scarves and hats, and so forth. The SBST stated that poverty and unemployment are the greatest barriers to development in the community.

Innova arranged a child protection initiative for the community in response to the high rate of teenage pregnancy, child abuse and neglect and the problem of substance abuse in the community. The initiative brought together various sectors such as the Department of Social Development, the South African Police Service, the Department of Health and the NPO, Families South Africa (FAMSA).The team visited two high schools and a primary school in May 2018 to talk to teachers and learners. Churches in the district are also targeted in inclusive education advocacy initiatives and information programmes.

The school believes that teacher well-being is an issue that is often neglected in inclusive

education policy implementation. Another innovative initiative took place to address teacher emotionality and well-being. The issue of teacher debt emerged as a factor that impacts schools negatively. The Innova SBST arranged a workshop for teachers and parents in the area. Counsellors from the National Credit Regulator (NCR) were approached to lead a lecture on how to manage finances, and reduce and consolidate debt obligations. The participants found this initiative invaluable.

Despite the encouraging emerging practices highlighted above, staff maintained that Innova Primary School faces ongoing barriers to inclusive education policy implementation – particularly a lack of funding to support innovative initiatives, large classes, under-resourced classrooms and teacher shortages and, that despite efforts to develop continual professional opportunities, teacher professional development is still inadequate. The principal and the SBST are committed to the care and support centre at the school, yet this allegiance and enthusiasm is dampened by a lack of funding. At the time of the study, the care and support centre was not fully resourced. Limited funding had been allocated for the role of a resource hub in the district, for example, to engage in activities such as workshops for teachers from neighbouring schools. However, it is laudable that the learning support educator and the school counsellor undertook funding drives to cover the cost of their Inclusion Outreach project, an advocacy initiative in the community. This demonstrates the capacity to self-organise, which is a key property of a complex adaptive system, where agents and actors continually organise themselves and, in dynamic ways, create order out of tensions (Clarke & Collins 2007). However, the question that arises is whether such initiatives are sustainable. Systemic inequities remain a challenge in this schooling context.

Complex systems operate under conditions that create disequilibrium and, as Cilliers (1998: 4) states, 'there has to be a constant flow of energy to maintain the organisation and to ensure its survival.' However, it also needs to be acknowledged that although disequilibrium stimulates the structures and processes in this school, and has led to changes that have already made a big difference, the concrete realities of the ongoing wider contextual challenges that this school community faces can influence their continued dedication to bring about change. We therefore agree with various researchers (e.g., Donohue & Bornman 2014; Walton 2016, 2018) that there is an urgent need to reconstruct the system to ensure sustainable quality inclusive education policy implementation. Acknowledging the emerging innovative changes at institutions such as the Innova full-service school should form the point of departure in addressing systemic inequities and other exclusionary factors that impact educational institutions.

Conclusion

The study presented in this paper demonstrates that this particular full-service school in a rural context is a complex adaptive open system, with actors and agents actively engaging with the intricacies of inclusive education policy implementation in a local context. The school has forged 'neural-like networks of interacting agents and interdependent agents and actors who are cooperatively bonded by a common goal' (Brown 2012: 5). The emerging innovative, often

unpredictable but contextually significant, practices highlight the significance of localised constructions of inclusive education that draw on the strengths and capabilities within the schooling context and the local community. School leadership and teachers clearly support a grounded approach to inclusive education and the need for spaces that build teacher agency and reflexivity, collective thinking and creative action. With specific reference to professional judgement, staff consider the complexities of their context, and the resultant situated knowledge, as well as their theoretical knowledge as important in the process of setting priorities, making decisions and acting to effect change (Winch 2014). This leads to inclusive education practices that are suited to the context.

By using complexity theory to describe and interpret what is happening in this school, the shift at Innova Primary School from traditional top-down and hierarchical forms of leadership to a form of adaptive leadership, as discussed by Brown (2012), have been illustrated. The performance of staff at Innova Primary School reflects a collective leadership identity as well as professional judgement decisions based on both working and professional approaches that are produced within interactions between actors, within activities and initiatives, and within interactive ideas and creative solutions to challenges (Cochran-Smith et al. 2014; Shalem 2014).

Finally, the study illuminates that within a complex adaptive system such as Innova Primary School, teacher beliefs and the professional knowledge of school leaders, including teachers in leadership roles, constantly evolve and are shaped by and through the adapting institution and interacting agents and actors within a unique context. The study reveals how professional judgement at Innova is based on reflexive collective inquiry in the educational setting, which is largely fostered by the proactive practices of structures such as the SBST at the school.

Not only teachers and other staff in leadership, but also district and nationally based education, staff need to recognise schooling contexts and education systems as unique complex systems that cannot be controlled by rules and regulations in a linear way (e.g., Kitching 2018). At Innova Primary School, leadership and teachers are of the view that in a complex environment, professional development is emergent and they need to be open to learning and development despite contextual pressures and priorities.

The above discussion is significant in that it has the potential to inform the development of a conceptual framework for adaptive leadership in complex organisations, particularly in schooling contexts that are committed to an inclusive education agenda. Such a conceptual framework is invaluable in that it may provide a lens through which to embrace leadership challenges and possibilities in complex organisations. Stacey (2007) emphasises the need for leaders to understand how to deal with the multiple intersecting contextual influences, unpredictable outcomes and non-linear relationships and occurrences that often occur in complex adaptive systems.

We summarise some of the key components of adaptive leadership and the roles of adaptive

leadership actors that the study has illuminated, and that are useful for further analysis:

- School leaders, including teachers in leadership roles, understand that complex organisations are unpredictable and non-linear in nature.
- Adaptive leadership is collective in nature and it occurs within, around and outside the system – reflecting strong dynamics of interaction and interdependence.
- Actors are responsive to change, create change, and continually work at managing change.

- Adaptive leadership is contextual and situated.
- Actors work with the complexity of issues, take risks and think creatively and innovatively to explore possibilities, to address problems and to develop the institution.
- Actors develop dynamic and contextually grounded networking strategies to achieve goals.

- Dynamic spaces are created for learning, adaptation, communication, dialogue and mutual meaning-making between leadership actors.
- There are spaces to build the agency, the flexibility and the reflexivity of actors.
- Central to adaptive leadership is the commitment to learn and generate new ideas collectively in response to contextual priorities.

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Governance in psycho-pedagogic practices for equity and inclusive education

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Abstract

This paper provides a reflection on how governance in psycho-pedagogic practices can bring about innovation in the complex context of inclusive education. Governance in this paper focuses on the processes and practices in classrooms, paving the way for an examination of the quality, quantity and distributive nature of teachers' interactive behaviours and attitudes in meeting the challenges of teaching. Examining governance in pedagogic practice can throw more light on teachers' efforts to address the potential of every learner by creating opportunities for full participation. Therefore, the operational definition of governance in the paper is to examine fairness around the ideal that every child participates fully in all class activities without discrimination or marginalisation. This raises questions about the demands made on learners – the focus of which is on learning outcomes rather than the enrichment of learners' skills for their equitable, meaningful and sustainable development. Learning contexts require a degree of negotiation because learning is social as well as cognitive, and teacher flexibility is crucial because managing these issues constitutes major challenges. Focusing on governance would be of significant value for better management of the complex issues of equity and the inclusion of all children in classrooms.

Keywords: psycho-pedagogy, governance, equity, inclusion, attitude

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Introduction

In this section, I bring scope and focus to the argument for examining governance in psycho-pedagogic practices to enhance inclusive teaching. To provide context and relevance, I outline the reasons for the necessity of this type of research in African schools and provide the theoretical background that informs this study.

Teaching is considered a rigorous and accountable discipline because of its significant role in determining education outcomes that are the product of interactions between teachers, pupils or students, peers and the tasks. Säljö (2007) explains that, because teachers and students engage in distributed knowledge-building activities, the complex social process they are involved in draws attention to the values dimension and responsibility of teaching. This reminds us that, aside from the pedagogical actions, the values perspectives require more attention from researchers. I consider it important for teachers to know how decisions about teaching and learning are made and implemented, and how they impact on the teaching and relational processes. In many classrooms, paying attention to these issues is difficult because teachers are pressured into teaching for the purposes of assessment because the curriculum is examination dominated. Many learners in such systems are in danger of failing because of a lack of focus on teaching to ensure understanding. This implies that there is some absence of focus on the 'values' and 'moral' dimensions of today's diverse classroom spaces – which raises questions about the relevance of a place for governance in inclusive teaching and learning processes. I argue that governance can ensure the foregrounding of values and moral issues in classrooms that address fairness and the opportunity for every child to participate fully in all class activities – without discrimination or marginalisation.

By focusing on governance, this paper provides a view of the classroom through a sociological lens in which regulations, routines, roles and leadership styles are significant. At times, we need to move beyond psycho-pedagogy practices that are dominantly cognitive to search for specific social-affective factors that can enhance or constrain learners' participation, and learning of outcomes. Examining governance in psycho-pedagogic practices demands a review of how social-affective factors affect the teaching and learning exchange between teachers and learners, and among peers in a classroom. In so doing, teachers would be better informed on how to address structural and interactive inequities related to the promotion of learning for learners from a variety of backgrounds (Hirschy & Wilson 2002). Educational outcomes can be maximised for all by understanding the sociology of the classroom context (Cortis 1977). Similarly, Palmer (1998) states that knowing and learning are communal acts among individuals, and where experiences are shared through different forms of interaction.

Central purpose of this paper

The purpose of this paper is, first, to examine the relationship between governance and psycho-pedagogy in classroom processes for inclusive teaching. Secondly, the paper addresses the 'value component' in classroom interactions, which encourages the participation of all in the teaching and learning process. The paper foregrounds the role of classroom democratic processes,

through the ideas of governance, with the learners being instrumental in initiating actions and participating fully. This is based on mutually reciprocal actions and the prioritisation of values and morals by the teacher in the classroom. The discussion is centred on the broader aspects of educational theory and societal aspects of education.

Some background reflections from the literature

Classroom observational studies have demonstrated that specific pedagogic practices (giving feedback and providing constructive support) greatly support learners' progress (Hattie & Timperley 2007). Any such changes in classroom governance impacts inclusive teaching and gives learners opportunities to experience inclusive teaching practices that add value and, ultimately, improve learner achievements. Hattie (2005) makes reference to *visible learning* when values are added into pedagogical practices.

Governance: Its indicators and relevance

Inserting governance into the discussion requires a clear understanding of the concept. Governance comes from the Latin verb '*gubernare*' (or, more originally, from the Greek word '*kubernaein*') which means 'to steer.' It can also apply to how people are directed and controlled by leaders and others at work and in life situations. Governance addresses two main processes: decision making and implementation. Governance refers to structures and processes designed to ensure accountability, transparency, responsiveness, rule of law, stability, equity and inclusiveness, empowerment, and broad-based participation (UNESCO 2015). Horvath (2017: 9) states that

> governance emerges from scholarship as a set of structures, regulations, rules, norms, standards, mechanisms, processes and practices – both formal and embodied – that both regulate, coordinate, steer and/or orchestrate (inter)actions as well as (re)produce socio-cultural, economic and political relations and values.

Although, classroom psycho-pedagogy is more focused on academic knowledge, which is mostly cognitive, I argue that it should have built-in governance practices so learners can also learn and preserve values that are important for living. These values can best be realised through integrated practices and experiences that engage learners in ways that promote values of inclusion. Enabling governance in psycho-pedagogy actions constitutes an empowering mechanism that will help all learners in class – allowing them to find space for effective participation.

The implications for governance in the classroom space

Governance has implications in addressing values and for creating the emotional tone in the classroom (Goodlad 1984). Flanders (1970) explains that when teachers dominate classroom talking and questioning it leaves learners at the surface cognitive level of listening and responding, rather than on a level of understanding. Flanders (1970) argues that this leads to a progressive diminishing of learners' active engagements in academic activities. And this is, in fact, a violation of the classroom contract between the teachers and the learners (Elkind 1979). Accordingly,

learners' passive role in classroom interaction infringes on the major goal of education – which is to increase learners' curiosity and ability to question teachers' knowledge. I argue that teaching methods that demand a passive role for learners infringes on their right to learn and is morally unacceptable.

The role of values in the classroom context for governance in psycho-pedagogic actions

Values are an integral part of teaching. What is taught and how teachers teach and interact is important because, at the heart of classroom practices in education, is the relationship between the teacher and learners. Kelly (1986) describes a teacher's role as formative, and the establishment and maintenance of relationships sets an important tone for this purpose in all classroom actions. Moral and ethical dimensions of teaching provide the core values context in which teachers are located (Kelly 1986). Teaching is a self-giving activity concerned with the good of the learners in the classroom. The concern for governance in psycho-pedagogic actions necessitates teachers' conscientious and systematic reflection on how their relationship with learners impacts their practices. Lawton (1980) argues that to be able to achieve the outcomes of conscientious and systemic reflection, the teacher must have a degree of control as they review their aims, plans and actions, and reflectively evaluate their teaching to reinforce effective practices. Every teacher has the responsibility for making their classroom a space in which positive values are explicit and in which all children can access learning and understanding.

The role of equitable rights in classroom relationships for governance and psycho-pedagogic activities

Every classroom requires responsible leadership in class governance activities in order to create an environment that is emotionally and socially enabling and upholds social justice and respects the rights of all. In classroom teaching, every aspect of teacher–learner transaction exists within the teacher–learner relationship, where each must be accepted as a free individual with rights. This establishes a rapport between two freedoms where both participants in an interaction have rights that should not be violated (Meirieu 1992).

Role of space in the classroom context

Cortis (1977) argues that the regulation of classroom behaviours and actions, including the expected outcomes, arises from the interactions of many factors in the context of the social process. Organisational arrangements in classrooms are important but often not well structured. Unavailability and inappropriateness of classroom spaces have negative effects on ensuring what education intends to achieve. Classroom space has direct and indirect implications for the learners' and teachers' participation in terms of reaching out to individuals, connectedness, collaboration, classroom mobility and sitting arrangements. Classroom space is valuable for cooperative learning groups and other methods that allow learners to experience equal status in the contact situation (Allport 1954).

Foregrounding self-confidence and self-image through psycho-pedagogic governance

Psycho-pedagogic governance issues are also important when we address the 21st century knowledge, competences and skills in education that must be built on values and morals. There is a need for us to start questioning teachers' competence in integrating the concept of equity when teaching in classrooms. This paper reiterates the need to support self-esteem, self-confidence and self-efficacy – and ensuring such development through degrees and levels of engagements (Tchombe 2017a, 2017b). Respecting governance in classroom practices should enhance and improve learners' locus of control and, in turn, their self-image and sense of self-worth. In many cases, teachers' negative interactive behaviours can erode the psychological tenets that enhance and enrich learners' will to participate in activities. In a large proportion of classrooms, learners and teachers do not have equal rights and the power dynamic is asymmetrical. In some cases, learners do not have equal chance to participate because of an unfavourable class ethos or teachers' discriminative and negative attitudes. This paper argues that education systems, through their policies, must pay attention to all the above issues and, through good governance, ensure that these are articulated into the classroom space.

Conceptual and theoretical issues emerging from the literature

Psycho-pedagogy

Psycho-pedagogy – a combination of two branches of study: pedagogy and psychology – could constitute a scientific basis for professional practices in education. The social science disciplines that inform education provide the substance for theories and principles interacting in pedagogy. Some of the most influential authors in this field are Jean Piaget (1952), David Ausubel (1968), Jerome Bruner (1960, 1966), Lev Vygotsky (1978) and Dewey (1916, 1938). Pedagogy refers broadly to the theory and practice of education, and how this influences learning and the growth and development of the learner. Pedagogy, as an academic discipline, can be described as the study of how knowledge and skills are exchanged in an educational setting. Today, Vygotsky's (1978) views draw attention to the fact that disability is socioculturally constructed, which to some extent, questions moral issues in classroom interactions and in the wider social context that led to this status. In this light, one can address the question of how this can be avoided by the kinds of decisions, responsibilities and implementation processes we engage in the classroom. Often, classroom actions are dominantly cognitively oriented – thus, the focus is on Bloom's (1956) cognitive domain of educational objectives almost to the exclusion of the affective (Krathwohl, Bloom & Masia 1964), which is valuable for inclusion. Erikson's (1968) work on psychosocial development is informative because it instructs how the social environment can affect healthy psychological development. Scholars (Maslow 1956; Rogers 1980) argue that these theories focus not only on cognitive perspectives, but also on the humanistic framework that addresses learners' personal and interpersonal needs as well as their interests. For any meaningful sustainable development to take place, the learners themselves must be active participants in the developmental process (Tchombe 2017b).

Governance in the psycho-pedagogic process for equity in the classroom

Dewey (1916), an educational psychologist and philosopher, characterised education as being participative and inclusive and reiterated the fact that education and learning should be experiential, considering a wide range of diversity. Education should recognise the values of equality – educational equality, like liberty and justice, are ideals towards which humans should work (Dewey 1916). Quality education entails offering practical and meaningful learning to learners. I argue that equity in education demands recognition of the differences of individual learners in the classroom. Equality in education entails that learners should all have the same opportunities afforded to them in the learning process. Cortis (1977) explains that, as the minds of teachers move in harmony with those of the learners through understanding these concepts, they appreciate their difficulties and so direct their skills for problem solving and transfer of knowledge in a flexible manner. Dewey (1938) rejects any idea of passivity or receptivity on the part of the learner who must be a participant, not a spectator in the teaching and learning process. Dewey (1916) maintains that the school is a society with shared interests and goals where communal activities and communication are characterised by participation and inquiry. Participation is the connecting element between the psychological and social factors in education (Dewey 1916).

The governance process and the role played by rules

Governance in the psycho-pedagogic process reminds teachers that, without rules, there can be no social context in a classroom for equity and morality. Dewey (1938) explains that there are rules that order the conduct of most actions in the fabric of society, and which come with accompanying sanctions. The teacher is responsible for knowledge of individuals and of the subject matter (Dewey 1938). I argue that, through governance, teachers are also responsible for ensuring that education is accessible to all in an equitable and moral way. This will only be possible if individual learners are motivated, and afforded the opportunity to participate and contribute effectively when engaging with activities in the classroom. This is only achieved through governance that directs the outcomes of thoughtful planning – planning that arranges conditions conducive for classroom action with the whole class fully engaged. As mentioned, education is a social process. As we comment on participation and its characteristics, it is important to address the concepts of freedom and rights afforded to every actor in the classroom space. Learners must have a degree of freedom in class if they are to acquire skills and knowledge, together with a well-developed self-esteem. According to Dewey (1938), freedom of intelligence is important – that is, individuals can be free to observe and make judgements for worthwhile purposes. Dewey (1938) proposes three values that help students to achieve freedom to learn and transform:

1. Freedom removes learners from restricted zones of silence and acceptance and enables them to disclose their individuality.
2. Freedom is the nature of the learning process through hands-on experience that enriches reflections and engages both motor and affective skills.
3. Freedom is a means for maintaining normal physical and mental health, which connects a sound body and mind.

Insisting on classroom participation without situating it in a governance framework of rules is futile if transformation of the learner is required. I argue that the desire to move from traditional classroom practices that foreground content and summative assessment to more flexible practices requires new classroom politics, and governance accommodates this. Moving from authoritarian to more flexible and collaborative practices allows learners freedom to be active and effective participants. I argue that learning takes place within a web of social relationships as teachers and learners interact both formally and informally to achieve the intended outcomes. Affective issues that form the basis for values must be addressed. Marzano, Waters & McNulty (2005) state that rules and procedures for general classroom behaviour deal with the broad areas of respect and courtesy as well as more specific issues such as listening to the teacher or to classmates who are speaking, and taking turns to speak and act. In some classrooms, teachers involve learners in establishing overall class rules for conduct, thus helping them learn to take responsibility for the overall environment of the classroom. Such practices help learners see themselves as respected and valued individuals. This is teaching for democratic thinking. Teaching for democratic thinking develops in children the skills required for asking questions and making meaning from everything they learn, and transforming what they learn into ideas that can be transferred to other problem-solving contexts. This will require teaching practice, grounded in ideas of governance, to assist the teacher with certain types of teaching that allow him or her to teach to all. Florian and Kershner (2009) postulated that advocating for an inclusive principle is based on what education intends to accomplish at any given level or period, and differentiated instruction should form a strong base to reach out to all learners.

What is inclusion in relation to this paper?

Inclusive education is about embracing all, and conveying value-orientated messages for pedagogy. These messages are:

- Disability is seen as a social responsibility.
- There must be an acceptance of difference.
- Celebrate diversity.

Inclusion, therefore, is not confined to the disabled. It is a means to avoid exclusion in all its forms, whereby we inculcate mutual respect and interdependence and, in the process, uphold and preserve children's interests and academic, emotional and social needs. In most classrooms, some children consciously or unconsciously are denied the opportunity to fully participate in decision-making processes.

The role of governance in classroom psycho-pedagogic practices

Governance as a value-oriented concept promotes responsibility, fairness, transparency and accountability (Can Atacik & Jarvis 2006). Governance in classroom interactions and transactions plays a major role in ensuring belongingness, connectedness, empathy and equal attention to all. Governance in classroom psycho-pedagogy helps to institute a culture of

democracy given that it practises equity and addresses quality and inclusion. I share the views of Robichau (2011: 126) who argues that 'governance should be discussed from a holistic approach emphasizing democratic ideals and practices at every meaningful opportunity.' Table 1 provides a general analytical framework for studying all kinds of coordination problems among actors (de Boer, Enders & Schimank 2007: 138). This paper reflects and interprets these indicators presented in the table.

Table 1: Indicators of good governance (de Boer et al. 2007)

Eight good governance indicators	**Reflections and interpretations of the eight indicators of good governance for psycho-pedagogic perspectives**
1. Participatory	Encourage participatory pedagogy through differentiated instruction.
2. Rule of law	State clear classroom rules, regulations and accompanying sanctions.
3. Effective & efficient	Well directed by psychological theories of development and pedagogic principles to guide practices – from stating objectives to classroom interaction and assessment.
4. Transparent	Learners should know the objective, plan and their role.
5. Responsive	Active not passive participants in giving and receiving; influencing and being influenced by others in a mediated mutually reciprocal manner.
6. Equitable & inclusive	Respecting diversity through differentiated teaching and ensuring access to knowledge at all levels of difficulty.
7. Consensus oriented	Learners must have a voice in classroom decision making, e.g., group formation, leadership role.
8. Accountability	From the above, both students and teachers are owners of the teaching learning process; both, in varying degrees, assume responsibility for the processes and quality of outcomes – thus, both can account.

Why governance in psycho-pedagogic process? Tying these together

Any classroom can be seen as a unit of society that must have rules, regulations and clear routines that respects individuals' rights and freedoms and enable collaboration and cooperation to prevail among its members. Both learners and teachers are active in the learning process through facilitating and regulating the process. A discussion on governance in classroom

psycho-pedagogy simply attempts to reflect on classroom practices that adopt democratic values for inclusion. Governance in classroom psycho-pedagogy should enable us to realise how values are inculcated in teaching, bearing in mind the emotional and social implications (Bevir (2011). Bevir (2011) explains how the core values of governance are efficiency, sustainability, transparency, accountability, predictability, fairness, responsibility, autonomy, freedom, safety, cultural. pluralism and sovereignty. The effectiveness of these practices must consider 'time,' 'space,' 'power' and 'scale' (Bevir 2011). Central to this paper is how teachers inculcate some of these core values in classroom practices. Though teachers are expected to be accountable, how do they, through practice, make learners responsible and accountable for their learning and include all in the process of teaching and learning?

Issues of classroom access

Access and participation are not usually guaranteed for all learners. They may have access to the physical space but may not have full access to the teaching programmes, social access to peers in class or even their teachers. To ensure full participation, there must be a healthy classroom climate that values diversity, provides a supportive learning environment – and with the presence of positive attitudes with no barriers that hinder full participation (Peters 2003). There must be opportunities that ensure equal access to all situations or aspects of learning to avoid both social and academic exclusions. Learners require a sense of belonging and connectedness so they can build on collection of behaviours. This has been seen where teachers praise children to encourage them. Some teachers even share personal stories and experiences. It has been found that these strategies have positive effects on educational processes and outcomes (Sidelinger et al. 2012). Hirschy and Wilson (2002) argue that peer interaction should be encouraged among learners, and that it has positive effects on educational outcomes. Teachers are usually a model for positive interactive behaviours in the classroom (Johnson, 2009).

Teachers' pedagogic content knowledge to reflect on psycho-pedagogic governance

I argue that teachers' pedagogic content knowledge informs their capacity to reflect on governance given that engaging children in quality academic activities is not necessarily through predetermined routines and rituals. Regular routines and rituals do not necessarily stimulate learners' cognitive capacity. They merely act as drivers to sustain learners' interest and attention.

Figure 1 illustrates the conceptual framework and relationship between key terms – the conceptual considerations of the paper and how these work in harmony to foster inclusive educational practices. Accordingly, inclusive education should embrace good governance. Psycho-pedagogy builds on humanistic psychological principles that are intrinsically related to learner-centred pedagogy. Hence, the figure illustrates that governance and psycho-pedagogy are key elements of inclusive education that foster the inclusive educational practices of equity and quality. In summary, the figure illustrates that when good governance and psycho-pedagogy are combined in inclusive education, the result will be the realisation of inclusive educational practices that focus on equity and quality.

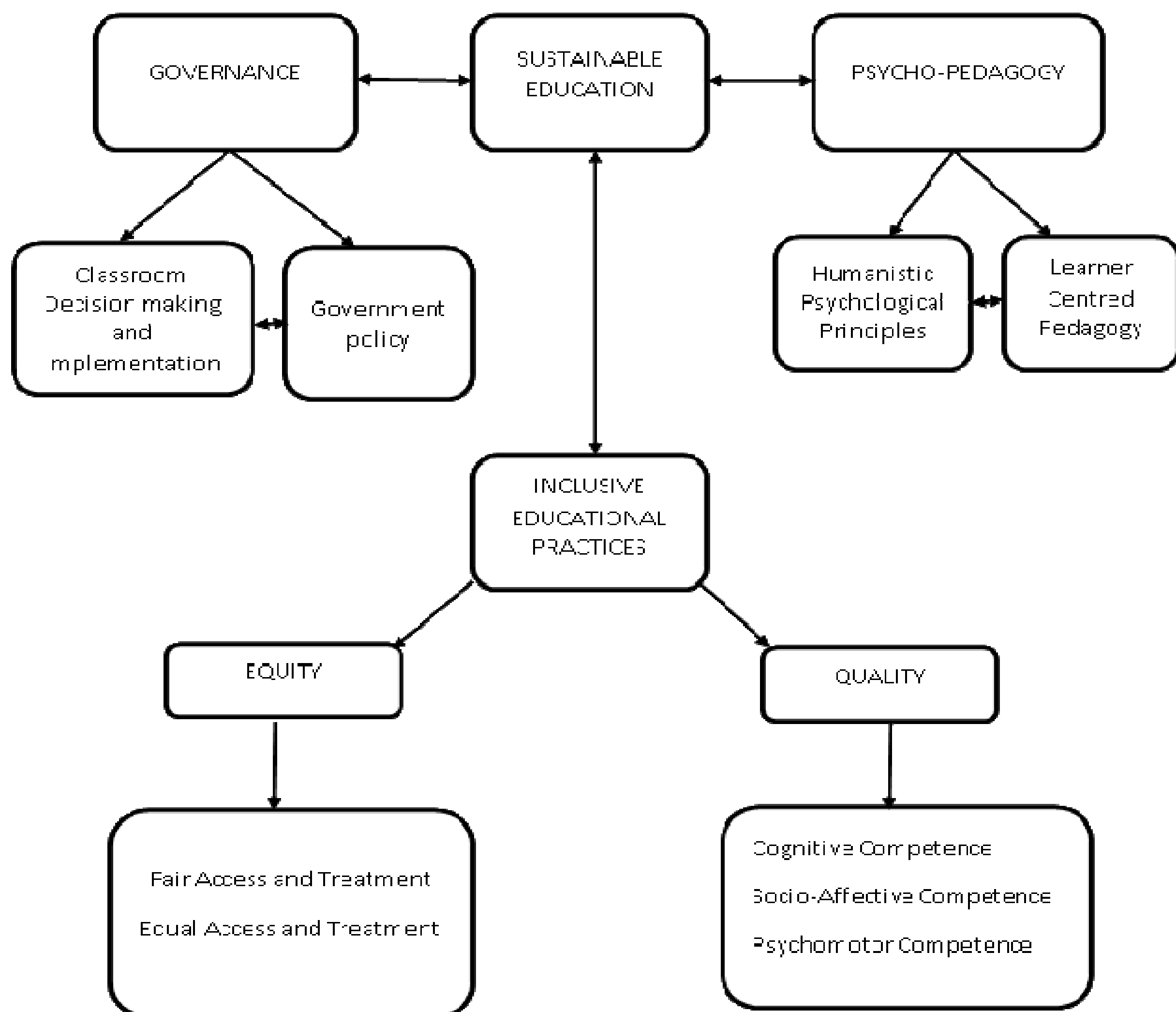

Figure 1: Conceptual considerations

Sustainable Development Goal 4 (SDG 4) and governance in psycho-pedagogic practices

The realisation of the UN sustainable development goals requires teachers to develop effective and efficient skills in classroom governance and to apply psychological principles in the teaching–learning process. SDG 4 lies at the base of the economic, social, political and cultural development of a nation. Relevant to this paper are sections 4.1, 4.5, 4.a and 4.a.1 (United Nations Economic and Social Council 2016: 19-20).

> **4.1:** By 2030, ensure that all girls and boys complete free, equitable and quality primary and secondary education leading to relevant and effective learning outcomes.

4.5: By 2030, eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples and children in vulnerable situations.

4.a: Build and upgrade education facilities that are child, disability and gender sensitive and provide safe, non-violent, inclusive and effective learning environments for all.

4.a.1: Proportion of schools with access to: (a) electricity; (b) the Internet for pedagogical purposes; (c) Computers for pedagogical purposes; (d) adapted infrastructure and materials for students with disabilities; (e) basic drinking water; (f) single-sex basic sanitation facilities; and (g) basic handwashing facilities (as per the WASH indicator definitions).

The enhancement of sustainable education indicates that teachers have great responsibility to prioritise understanding and meaningful learning, without which they will fall short in the domain of psycho-pedagogic ethics. These challenges seem not to be considered as governance issues in the classroom. This is because governance is limited only to the level of government policy for schools, with little attention paid to classroom level or to the actual implementation contexts. In fact, teachers do not only need to be more conscientious and reflective regarding governance in their classrooms, they must adopt creative and innovative strategies to achieve the desired goal of educating all the children in their care. How responsive are teachers to learners' individual needs? Are teachers transparent in their classroom practices? Do they ensure stability in their classrooms by the way they organise and manage classroom events? Do they empower learners to assume class responsibility or empower them with the quality of their questioning strategies, using prompts and probes to enable them to participate with confidence?

To answer these questions, teachers should engage in the implementation of learner-centred instruction in the classroom. This entails the use of inquiry-based learning and cooperative learning strategies that:

- Take learners' interests into account.
- Follow learners' passions.
- Help learners form a strong learning community.
- Move from the idea of the teacher as the primary expert of the class.
- Work toward meeting individual learner's needs as they grow.

These approaches and strategies foster equity and inclusion and demonstrate the centrality of the learner in the teaching–learning domains.

Addressing governance in psycho-pedagogic actions provides opportunities for learners to enhance their meta-cognitive and interpersonal skills for the enrichment of their development. Governance principles employed in psycho-pedagogy would sustain learning outcomes through teachers' conscious pedagogical behaviour and the generative potentials of the learners as they directed learning. When this occurs, opportunities are created by both learners and teachers for furthering the learning of new knowledge and skills. This adheres to the belief that the learner has the potential to transform complex situations, and for continuous transformation of knowledge into

newly assimilated ideas (Tchombe 2017a, 2017b). The ability to do this enhances transferability of knowledge. The urgency arises because of the challenges posed by understanding the importance of both learner access to lesson activities and the need for differentiated approaches when teaching.

Teachers' attitudes as a moral concern for psycho-pedagogic governance in inclusive education practices

Teachers' attitudes, generally, are influenced by their intentions and their behaviours, formed through experience and implicit learning. (Kuester 2000) argues that teacher attitude is critical to the successful implementation of inclusive programmes. Negative attitudes towards inclusive teaching corresponds to less effective instruction, and can lead to lower academic performance by learners with disabilities (Cook, Cameron & Tankersley 2007). Literature is replete with information showing that teachers' distribution of attention is selective (for example, Tchombe 2014).

Selective attention distribution

Teachers do not challenge girls with higher order cognitive questions, but offer criticisms of their work (Tchombe 2014). Teachers also need to challenge gender bias and bias for vulnerable learners who are disadvantaged. Teachers should be encouraged to examine their practices and pose questions about their approach to teaching. For example, which learners do they frequently interact with? Are certain learners targeted, or receive proportionally less attention in their classroom? If so, how does the teacher deal with those situations? What questioning techniques does the teacher use to engage learners? Does the teacher ask questions for the creation of knowledge to girls as well as boys? Does the teacher use a variety of pedagogical and assessment practices? Which learners are engaged with the curriculum?

Teacher education to address teacher disposition to inclusive teaching

There is the need to educate well-qualified teachers in competency-based and learner-centred approaches. According to Misztal and Trawiński (2005), unsuccessful teachers have a personality unsuited to teaching at the root of their attitudinal mismatch. In other words, they are constitutionally not suited to teaching. This personality mismatch leads to an ethical dilemma, where they have a negative or otherwise inappropriate attitude towards learners. The ethical failure in these areas leads to technical failure, which often manifests as discipline problems and administrative failure in that the course they are teaching is not covered properly. Both these failures result in decreased learning so the final manifestation is productive failure.

Because of the failures discussed here, there is need for psycho-pedagogic governance in the classroom context (and transformation in teacher beliefs) for equity and inclusive participation. Furthermore, there is need for in-service training to be provided to teachers so that they can overcome their negativity and resultant low self-esteem. This would enable teachers to build their psycho-pedagogic capacity to optimise the interpersonal relationships required in the process of

teaching. Some of these are the capacity to organise learners with regard to tasks, establish cooperative relationships, ensure an adequate climate of respect and cooperation within groups of learners as well as establish effective relationships with parents, communities and other institutions (Blândul & Bradea 2017).

Implications for teacher education

Teacher education as a whole has faced many challenges. This has ignited reflections on the need for transformation in teacher education and training, especially given that examination performance seems to be the major determinant of teacher quality (Tchombe 2010). This view narrows the complex task involved in teacher education, which initial training does not have the capacity to address. The 21st century's multiple demands call for further examination and reflection on classroom activities, particularly in cases where the curriculum is examination dominated. Responding to the demands of an examination-oriented curriculum will have negative effects on pedagogic practices because teachers tend to compromise on effective practices for quality learning outcomes. For the professional development of teachers, I argue that there is need for a shift to a transformative paradigm, focusing on research into governance and where processes can create a space for classroom governance. This will require teachers who are flexible, reflective, imaginative, creative, innovative and have an enquiring mind. Teacher education must focus on developing pre-service teachers' meta-cognitive skills (such as evaluation, monitoring, planning, creativity, imaginativeness, etc.). To educate such a teacher requires more than a modification or change of the training programme. Change is often an event that merely alters an entity, while transformation is usually a process that is unending and involves all, constructively and systematically. So, to address equity, quality, inclusion and relevance concerns for all participants in any classroom demands clear pronouncement on teacher development that is transformative. I suggest that such a pronouncement should be accompanied by other concerns personal to the teacher that can affect psycho-pedagogic governance practices in class. Some of these are the teacher's morale, prestige or status, career and professional mobility, salary and technical allowances and other social amenities to reduce attrition from the profession, and to increase commitment and dedication.

Conclusion and recommendations

Bringing governance into the theory and practice of teaching speaks the language of fairness and quality participation by all – void of discrimination and marginalisation, which can create cognitive dissonance through an environment that is not enabling. The challenges teachers face are significant because the realities of the classroom are never properly addressed in training, for example, strategies and techniques for handling inclusive classrooms. It is important that teacher education programmes find space for courses on governance to enable teachers to be well-grounded in the issue as it relates to classroom practice. As Labaree (1992) so aptly points out, teaching is an enormously difficult job that looks easy. Because personality, classroom culture, and other affective elements in the classroom are limitless in their complexity and scope,

teacher education programmes have had difficulty in conceptualising what the definition of a good teacher is, and more specifically, creating generalised classroom management rules and strategies that would apply to every pedagogical setting (Labaree 1992). Despite the challenges, research informs us that teacher education programmes are indeed making a difference. This article illustrates that teachers should address governance in their practice, which could add to the strength of research into inclusive teaching and practical applications.

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Contributions of social workers' professional judgements within a multidisciplinary team in mental health care

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Abstract

The complex nature of the field of mental health in a resource scarce country was recently brought to light after the death of more than one hundred psychiatric patients in South Africa. This tragedy highlighted the interaction of factors that influence mental health, and emphasised the need for a holistic and systemic approach to mental health care, and especially sound professional judgment and ethical decision-making. The contributions of multidisciplinary teams to the care and treatment of mental health users are well documented, however, in South Africa, the role of the social worker in these teams is not well recognised, researched or defined. In practice, social workers draw on rigorous theoretical knowledge and an array of skills and competencies when engaging with client populations at micro, meso and macro levels. Professional interventions are guided by specific knowledge and skills, requiring sound professional judgement and ethical decision-making. This article highlights what it means to be a social worker contributing professional judgements to mental health care decisions, and describes the unique role of social workers within multidisciplinary teams in mental health care. The implications of the social worker's role in contributing to decision-making for both mental health care contexts and tertiary institutions responsible for training social workers, will be interrogated.

Keywords: multidisciplinary team, social workers, mental health care, professional judgement, ethical decision-making

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Introduction

The complex nature of the field of mental health in a resource scarce country was recently brought to light after the death of more than one hundred psychiatric patients in South Africa. This tragedy highlighted the interaction of biological, psychological, social and political factors that influence mental health and emphasised the need for a holistic and systemic approach to mental health care. In addition, the necessity of sound professional judgment and ethical decision-making when treating mental health care users was underlined.

In this article, we argue that the professional judgements of social workers play a vital role in the complex context of mental health care. Traditional biomedical notions of health have simplified and understated the causes of mental health difficulties, neglecting psychosocial elements and limiting treatment for mental health care users and their families (Lakhan 2006). The complexity of mental health care contexts is rooted in contemporary understanding of mental illness as a multidimensional concept with several interplaying factors. The South African context introduces additional variables to this already complex field such as resource scarcity, socioeconomic challenges and cultural influences.

Managing risk, assessing functioning, deriving a diagnosis and developing an appropriate treatment plan for mental health care users requires the involvement of a multidisciplinary team (Haines et al. 2018). Decisions made in mental health care contexts are, in many cases, life altering in that they can have significant ramifications for the individual and family. In order to reach decisions about patient care, each discipline provides important input from its scope of expertise (Haines et al. 2018). The psychosocial and environmental factors that cause, precipitate and perpetuate mental illness means that the input of social workers in decision-making is paramount. Social workers are equipped with the theoretical and practical knowledge to identify and intervene to address these factors at an individual, group and community level and, therefore, make a valuable contribution to the care of mental health users and their families (Aviram 2002). The professional judgement of social workers is crucial to multidisciplinary team decision-making in mental health care contexts.

Despite their integral role in the multidisciplinary team, social workers in mental health care institutions are often considered a 'secondary or sub-ordinate profession' (Aviram 2002: 625) in the field. The lack of a formalised scope of practice of social workers working in mental health settings, as well as limited research about the role of social workers in this field in South Africa (Ornellas 2014), undermines the professional stance of social workers when intervening in mental health care settings. Aviram (2002) argues that social workers need to establish their professional identity and legitimacy in this field, and this article introduces important debates about their professional role in mental health care settings. It asserts that social workers make use of professional knowledge and judgements to inform decisions and interventions that are central to the care and treatment of service users in mental health contexts.

Mental health: A complex context

Historically, health and illness have been explained and understood predominantly through a biomedical paradigm. In this paradigm, health is defined as the absence of disease and illness is perceived to have exclusively biological causes and correlating physical or physiological sequelae (Engel 2012). Mental illness, from this framework, is thought to originate from neurobiological or physical pathologies (Deacon 2013; Barlow & Durand 2015). The behavioural, cognitive and emotional distortions that present in mental illness are also attributed to underlying biomedical aetiology (Engel 2012). Therefore, the treatment of mental illness is primarily aimed at addressing the biomedical cause of the illness, typically through pharmacological interventions such as psychotropic medications (Deacon 2013). Other factors that contribute to mental health difficulties have been neglected. As a result, prevention, early intervention and treatment efforts have been insufficient and ineffective (Lakhan 2006), often indicating poor prognosis for mental health care users. Treatment through a biomedical framework fails to address the chronic nature of mental illness and the pervasive impact that it has, not only on mental well-being but also on an individual's cognitive, emotional, occupational and social functioning (Overton & Medina 2008; Deacon 2013).

The shortfalls in the biomedical paradigm have given rise to the development of a more holistic framework, pioneered by clinicians, George Engel and John Romano, which acknowledges the multidimensional nature of health and illness (Barlow & Durand 2015). A biopsychosocial model of health asserts that there is a dynamic interaction among biological, psychological and social factors that, together, can cause and influence the onset and course of a mental illness and affect the treatment, prognosis and recovery process (Deacon 2013; Lehman, David & Gruber 2017). In addition, emotional and cultural factors contribute to the dynamic relationship among those factors. In the biopsychosocial approach, no direct cause or aetiology is fixed for any single disorder (Botha & Moletsane 2009). The interplaying factors are continually changing, and may be influenced by external factors such as unexpected changes in the environment, for example, natural disasters, and economic and political circumstances. Integrative treatment approaches that consider biopsychosocial factors are increasingly being utilised, and proven successful, in case management of mental illness in psychiatric institutions (Yang & Tsai 2013; Kaplan & Berkman 2016). Figure 1 indicates the relationship between the different factors in the context of political, economic and environmental circumstances and changes.

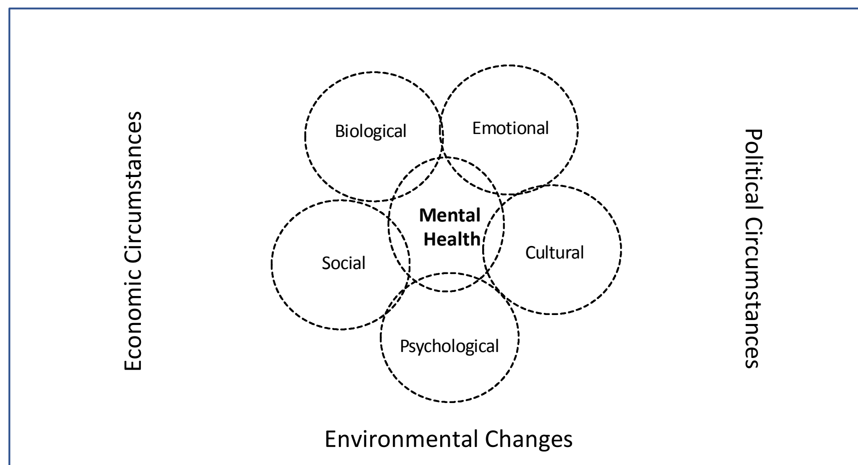

Figure 1: Factors influencing mental health

Biological factors include any organic, physical or structural origin that may cause symptoms of mental illness like behavioural changes, cognitive distortions or functional declines (Deacon 2013). Genetic predisposition, indicated by a family history of psychiatric diagnoses, is a significant contributing biological factor and may make an individual more vulnerable to mental illness (Barlow & Durand 2015; Freitas-Silva & Ortega 2016). In the case of genetics, it is important to consider that a family history of psychiatric illness does not necessarily guarantee the onset of a mental illness. The presence of other emotional, psychological and social vulnerabilities will play a significant role (Barlow & Durand 2015).

Neuroscience has revealed that acquired or congenital structural abnormalities, brain damage and injury, abnormal brain development, or atrophy of areas of the brain also influence and contribute to psychopathologies and symptoms that present in mental illness (Zillmer, Spiers & Culbertson 2008; Deacon 2013; Barlow & Durand 2015). Some psychiatric symptomatology may develop secondary to another medical condition such as an HIV infection or hydrocephalus, which will also impact certain parts of the brain). Imbalances in chemicals in the brain are also believed to be associated with specific symptoms in psychiatric diagnoses (Botha & Moletsane 2009; Barlow & Durand 2015). Although these biological factors are noteworthy in light of their contribution to the biopsychosocial model, it is beyond the scope of this article to comprehensively explore each of them. However, the biological factors, along with psychological elements, can increase an individual's vulnerability for the development of a mental illness.

There are several psychological elements that can contribute to, perpetuate and worsen the course of a mental illness. Cognitive, emotional, attitudinal and interpersonal skills and functioning are important psychological factors to consider in mental illness. A disturbance in the healthy development of these skills might increase risk or vulnerability for mental health difficulties and might worsen the prognosis for some disorders (Lehman, 2017). The roles of identity, personality development and temperament are also prominent in many mental health difficulties (Barlow & Durand 2015; Lehman et al. 2017). For example, individuals with low self-esteem may be more

likely to experience anxiety, poor social adjustment and other mental health difficulties in their lifetime (Louw & Louw 2014). Coping skills, which refer to the process of managing demands, stressors and adverse life events (Taylor & Stanton 2007), also are a significant factor that might influence the development of, or perpetuate, mental health difficulties. Poor or maladaptive coping skills, featured as a symptom in several different psychiatric diagnoses (Barlow & Durand 2015), can interfere with interpersonal relationships and emotional regulation (Taylor & Stanton 2007). Poor coping skills will also impact the way trauma and adversities are processed and managed. Negative life events such as abuse, exposure to violent crime, the loss of a loved one are also known to play a triggering role in the onset of mental health difficulties – sometimes in conjunction with other biological and social risk factors (Kinderman 2005; Hammen & Watkins 2009).

Early life experiences are also significant in the psychological element of this model. Most prominent is the influence that attachment has on an individual's mental health and well-being. Attachment refers to the development of emotional bonds and relationships with caregivers early in life. Attachment theory focuses on how these early relationships and bonds may 'shape a child's perception of security, trust in self and others, and self-belief' (Bailham & Harper 2004: 52). The attachment style that a child develops is dependent on how a caregiver responds to the child in distress, soothes the child and treats the child in early years (Louw & Louw 2014; Barlow & Durand 2015). The attachment style will strongly influence an individual's functioning in interpersonal relationships and his or her capacity for emotional and behavioural regulation. Healthy attachment is believed to predict more adaptive functioning and positive experiences in relationships. Unhealthy attachment styles, however, are strongly linked to the development of personality disorders and other psychiatric symptoms (Bailham & Harper 2004; Barlow & Durand 2015).

There are several social determinants in mental illness. Chronic stressors in the home environment, like divorce, unemployment, experiences of maltreatment and abuse, exposure to domestic abuse and chronic diseases such as HIV/AIDS, are likely to contribute to mental health difficulties in childhood or later in life (Flisher et al. 2012; Barlow & Durand 2015). Violence in communities and households is another contributing social and environmental factor in mental illness (Louw & Louw 2014). Substance abuse, which may result in parental absence, poor supervision of children, poor family relationships and violence may also increase vulnerability to mental health challenges (Flisher et al. 2012; Barlow & Durand 2015). Substance abuse in communities or in the home may make an individual more likely to engage in substance abuse, which can contribute to psychiatric illness (Barlow & Durand 2015). Other socioeconomic stressors and social stressors such as absolute and relative poverty, conflict at work and injury are also linked with vulnerability to certain mental illnesses (Kuruvilla & Jacob 2007; Stein & Wilkinson 2007).

Poor parenting, negative experiences in the family and family discord as well as poor social support, social isolation and a lack of close relationships are also contributing social stressors that may increase vulnerability to the onset of mental illness (Aviram 2002; Meadow, Mok &

Rosenberg 2007; Stein & Wilkinson 2007; Hammen & Watkins 2009). Included in social factors is culture, which creates additional complexities for mental health care practitioners, particularly in South Africa.

In primary and tertiary institutions, mental health is commonly diagnosed and treated through a Western medicine perspective that often neglects traditional and cultural notions of health and illness. From a cultural perspective, mental health difficulties may be attributed to a range of traditional beliefs, for example, ancestral displeasure or neglected or incomplete rituals and customs (Sorsdahl et al. 2010; Edwards 2011). Symptoms attributed to mental illness, such as hallucinations, also contribute to the belief that an individual experiencing such symptoms is receiving the calling to become a traditional healer (Geekie et al. 2012). These beliefs are underpinned by the notion that 'when ancestors call an individual to become a traditional healer, they inflict a mental disorder on that person' (Sorsdahl et al. 2010: 286). The concept of culture in mental illness therefore brings an additional element to the biopsychosocial model, which needs to be considered when diagnosing, treating and intervening in mental health contexts (Mpofu 2011). Knowledge about, and understanding of, different traditional beliefs and practices is important because an estimated two thirds of the global population, and approximately 80% of Africans and South Africans, will consult traditional healers and follow indigenous remedies (Botha & Moletsane 2009; World Health Organisation 2001).

The biopsychosocial model to health is increasingly being recognised for its holistic approach, which integrates biomedical, emotional, psychological, social, cultural and environmental dimensions in patient care (Kaplan & Berkman 2016). This model underpins and guides decisions about the diagnosis, assessment and treatment of mental health care users and their families. Utilising this approach in mental health care contexts requires multidisciplinary teamwork (Browne 2012; Kaplan & Berkman 2016).

Multidisciplinary teams in mental health contexts

A multidisciplinary team is defined as a clinical team 'that collaborate[s] in assessing clients' problems and delivering services' (Hepworth et al. 2010: 29). In mental health care contexts, multidisciplinary teams are routinely used to carry out treatment and care to service users (Elder, Evans & Nizette 2009). The main focus of the multidisciplinary team is to restore the patient's premorbid functioning by reducing the symptoms and impairments that present as a result of the disorder (Liberman et al. 2001). The multidisciplinary team is made up of a variety of health care professionals including psychiatrists, nurses, psychologists, dieticians, occupational therapists and social workers (Dziegielewski 2004; Elder et al. 2009). In mental health contexts, multidisciplinary team approaches are valued over individual interventions because cases are often complex due to unpredictability in the course of the disorder, which often presents with relapses, plateaus, treatment resistance, sudden regressions and marked improvements (Liberman et al. 2001).

In multidisciplinary team collaboration, every professional contributes their own expertise, knowledge and skills and intervenes within their scope of practice. The boundaries of each professional are clearly delineated, although allied professionals need to have sufficient understanding of the functions and contributions of each discipline to patient care (Coghill et al. 2009). The interventions of each team member are complementary, and aimed at achieving mutual goals and agreed outcomes to compile a holistic treatment and intervention programme that addresses all aspects of health and well-being (Schell et al. 2014). Liberman et al. (2001) state that multidisciplinary teams have a variety of functions in mental health contexts including assessments, diagnosis, pharmacological treatment, substance abuse interventions, occupational and vocational training, family psychoeducation and support, and linking with employment, financial or infrastructural resources. Each member of the multidisciplinary team will have a specific role to play in providing these services and will work from a specific theoretical and practice framework (Elder et al. 2009). Furthermore, every professional is equipped with the appropriate expertise to address the different factors in the biopsychosocial approach, for example, a medical doctor will be responsible for intervening at a biological level by prescribing medication. Essentially, the multidisciplinary team approach should provide ‘a full array of comprehensive, coordinated and competently delivered services’ (Liberman et al. 2001: 1331).

Sole practitioner interventions have been phased out in many mental health care institutions because they result in narrow, individualistic interventions that often only address one element of an individual’s presentation (Liberman et al. 2001). Effective multidisciplinary teamwork, however, is resource intensive (Leach et al. 2017) and requires ongoing training for professionals (Walton 2016) and is therefore not always possible in resource scarce contexts. Multidisciplinary team approaches therefore may not be a standard practice in all health care settings. However, decisions made by multidisciplinary teams, particularly in mental health care contexts, are argued to be better than those made by individually practising professionals (Sharma et al. 2016). The contributions of social workers’ professional judgements are valuable to the overall decisions made by these teams.

Professional judgement in mental health contexts

Professional judgement is defined by Vibeke and Turney (2017) as a process in which a practitioner analyses a client and his or her circumstances for the purpose of making recommendations and developing treatment and intervention plans. It requires purposeful and systematic thinking from the professional. The rationale for decisions is rooted in the application of appropriate knowledge and experience in the specific context (Elementary Teachers Federation of Ontario 2016) and is guided by ethical principles such as professionalism, respect for autonomy, non-maleficence and beneficence (Reamer 2013). Cook (2016) asserts that professional judgement involves both a process of critical thinking and a plan of action. The organisational policies and the practice setting will strongly influence the professional judgements of practitioners (Downie & Mcnaughton 2013; Helm & Roesch-Marsh 2016). In complex contexts

where there are several interplaying factors, professional judgement and decision-making is both challenging and imperative (Vibeke & Turney 2017).

The need for sound professional judgement is crucial because practitioners are held accountable for their decisions and actions (Vibeke & Turney 2017). Mental health is one of the many settings that involve 'high-profile decision-making' (Taylor & Whittaker 2018: 105) by health practitioners. Detaining individuals in hospital and treating them against their will, determining leave of absences and discharges are some of the many life-altering decisions that need to be made daily, and require sound and competent professional judgement by the treating team (Haines et al. 2018; Taylor & Whittaker 2018). Assessing a patient's risk for suicide, self-harm or harm to others are also particularly high-stake decisions that need to be made in mental health care contexts (Bouch & Marshall 2005). In mental health contexts, professional judgements are determined by four different factors. First, theoretical knowledge, fostered through academic research and tertiary level training, forming evidence-based knowledge about effective treatment regimes (Downie & Macnaughton 2013). Second, practical or experiential knowledge is important for professional judgement (Cook 2016). In psychiatry, judging the prognosis of a particular patient might be derived from practical experience of treating patients with similar conditions or by gaining insight into the patient's life and circumstances that could influence the prognosis. Third, professional judgement is guided by the understanding of legislation and ethical frameworks that influence patient care and treatment. In South Africa, the Mental Health Care Act 17 of 2002 is the framework under which psychiatric care is provided, and which guides decisions made with regards to patients in these contexts. Last, professional judgement should be guided by the best interests of the patient. Essentially, the patient should be an equal in the practitioner–client relationship, and should be able to participate in decision-making (where appropriate) about treatment and care (Downie & Macnaughton 2013).

With these four factors guiding professional judgements, multidisciplinary teams work collaboratively to reach decisions about the patient's circumstances as well as the diagnoses and treatment plan. The quality of care is asserted to improve when specific allied professionals contribute perspectives from their scope of practice into the decision-making and planning of care (Haines et al. 2018). In spite of this, challenges are still encountered with regards effective decision-making in multidisciplinary teams (Sharma et al. 2016). Ensuring an effective multidisciplinary approach means that the clinical environment needs to acknowledge, encourage and support the expertise, knowledge, abilities and judgements of individual team members – and value these as contributing to the overall approach to care of service users. It is important, therefore, to recognise the importance of social workers' professional judgements in mental health contexts. Social workers form an integral part of the multidisciplinary team and, like all the members of the team, have valuable knowledge and skills to address psychosocial factors. Unfortunately, the social work profession is often perceived as less valuable and is undermined in several practice settings, despite the fact that social workers have access to 'a reservoir of deductive propositions' and 'disciplinary-based knowledge of procedure' (Shalem & Slonimsky

2013: 80).

The role of the social worker's professional judgement in mental health care

Decision-making in many social work contexts is often life changing for clients, families and communities (Taylor & Whittaker 2018). Although social workers are not responsible for making final decisions in mental health care contexts but, rather, form part of the multidisciplinary team, their professional judgements are likely to contribute to assessment and decisions about diagnoses, treatment and intervention plans (Hutschemaekers, Tiemens & Kaasenbrood 2005; Haines et al. 2018; Taylor & Whittaker 2018).

Several theoretical foundations inform social work interventions with client populations, however, social work practice is strongly aligned with a person-in-environment perspective and with systems theory. Aviram (2002) argues that social work's strong orientation to this theory, in conjunction with emerging ideas that the environment has an important role to play in the psychiatric well-being of patients, reinforces the need for, and fundamental role of, social workers in mental health care. The alignment of systems theory with social work practice in mental health care makes it a valuable theory on which professional judgements and decisions can be based. The theory provides social workers with a unique lens to analyse and understand the environment, and how contextual factors – such as poverty, unemployment, violence – might influence the individual (Friedman & Allen 2011; Cook 2016). From this theory, individuals cannot be understood without considering the systems (e.g., political, occupational, religious and family) within which they interact (Friedman & Allen 2011). Because of the reciprocal interaction between these systems, a change or dysfunction in one system can impact the individual and his or her functioning (Collins, Jordan & Coleman 2010). Social workers' knowledge and understanding of this theory allows them to assess and intervene at both an individual and a systemic level when working with client populations (Aviram 2002). In mental health care, the social element of the biopsychosocial approach is brought to light by the systems approach.

Professional judgement is intrinsic to social work and influences all aspects of the role social workers fulfil (Cook 2016). The model of teaching values and ethics during the professional training of social workers contributes to the development of professional judgement in decision-making in social work practice. Pullen-Sansfacon (2010) argues that reflective practice, in combination with the development of practical reasoning (as a collective activity among social work students, in collaboration with lecturers), assists with developing virtue ethics in social workers. MacIntyre (1985: 191) explains a virtue as 'an acquired human quality' that can be ignited and promoted through practical reasoning. Ethics and values, as human qualities, have to be practised (Lynch & Lynch 2006) and internalised as part of the being of a person – as opposed to being a once-off act. This model of teaching is the foundation of developing professional judgement in decision-making by social workers.

There are unique characteristics of a psychiatric setting that may influence the role and

responsibilities of the social worker in these settings. The Mental Health Care Act 17 (2002: 7) defines a psychiatric hospital as a 'health establishment that provides care, treatment and rehabilitation services only for users with mental illness.' The social worker's role in service delivery to mental health care users includes assessments, interventions, and discharge and post-discharge care (Aviram 2002). Social workers also have a valuable role to play in prevention programmes (Dhooper 2012). This section will provide a global account of the role of the social worker in psychiatric care to illustrate the complexity of the context of mental health, and the value of the professional judgement of social workers in prevention, early detection, and throughout the helping process.

Primary, secondary and tertiary prevention

Primary, secondary and tertiary prevention efforts are frequently utilised in social work practice and are in keeping with a developmental approach to welfare services that prioritises programmes aimed at preventing the development of individual, group and community issues (Department of Social Development 2011). Prevention refers to the addressing of individual or systemic factors in order to promote well-being and reduce the likelihood of social or individual problems. Prevention focuses on developing resilience, enhancing self-reliance and building on the strengths of client populations (Department of Social Development 2011; McCave & Rishel 2011).

Prevention efforts are imperative in mental health care (Min, Lee & Lee 2013) and can occur at three different levels, namely, primary, secondary and tertiary prevention. Primary level prevention includes efforts to reduce the likelihood of the onset of a psychiatric illness by targeting a whole population (Dziegielewski 2004; McCave & Rishel 2011; Dhooper 2012) or groups who are at risk for developing mental health problems (Petersen & Govender 2010). At a secondary level, populations or groups at particular risk (McCave & Rishel 2011), or individuals displaying early signs of a disorder, are targeted (Dhooper 2012). At a tertiary level of prevention, efforts are put in place to minimise the effect of the illness on the patient and family, particularly if it is chronic in nature, and to reduce the chance of reoccurrence (Petersen & Govender 2010; Dhooper 2012). The professional judgements of social workers can be vital in prevention and early detection efforts in mental health care given that they will underpin and guide assessments and service provision by social workers and the multidisciplinary team at each of these levels.

Assessment

The assessment is the first and perhaps the most valuable step in the social work helping process. Professional judgement is a core guiding principle in social work assessments (Bolger & Walker 2014; Vibeke & Turney 2017). Vibeke and Turney (2017: 3) assert that, although social workers have access to procedures and tools that guide the process, professional judgement that includes 'critical and analytical thinking' is crucial in assessments. Professional judgement during the assessment process is particularly necessary because social workers are often required to make decisions based on minimal, unreliable or complex information (Vibeke & Turney 2017).

The initial role of the social worker when a patient is first admitted to a psychiatric hospital is to

conduct a psychosocial assessment. This provides a framework through which the social worker can explore the presenting problem, the needs of the patient and available strengths and resources. The assessment also allows the social worker to determine the psychological and social functioning of the individual (Hepworth et al. 2010; Engstrom 2012), and assess whether there is any social dysfunction that needs to be addressed, for example, substance abuse (Walton 2016). Furthermore, social workers assigned as case manager will assume 'primary responsibility for assessing the needs of a client and arranging and coordinating the delivery of essential goods and services provided by other resources' (Hepworth et al. 2010: 28). This is particularly important when patients do not have the insight, skills or knowledge to access these services on their own (Aviram 2002; Hepworth et al. 2010).

Social workers may also be tasked with conducting risk evaluations through which they determine the patient's risk to him- or herself, others and to property (Engstrom 2012). In mental health contexts, the outcome of risk evaluation will strongly influence decisions made with regards to the patient's care, for example, whether the patient will be treated as a voluntary, involuntary or assisted user under the Mental Health Care Act. Social workers typically do not diagnose patients because this is the primary role of the psychiatrist, however, social workers in mental health care settings may practise with knowledge of the diagnostic criteria and the implications of such a diagnosis on the individual and his or her functioning. A comprehensive assessment of the *individual* is paramount; however, from the systems theory perspective, understanding other key systems and how these influence the service user's life is equally valuable (Compton et al. 2005; Zastrow 2010).

Assessment of the family circumstances and home environment is important in the context of mental health, particularly in light of the role that the family and home environment play in mental health difficulties and the influence these systems could have on the prognosis of the patient (Meadow, Mok & Rosenberg 2007; Hammen & Watkins 2009). Assessing family context allows the social worker to identify the support structure available to a patient (Zastrow 2010; Engstrom 2012) or to gain insight into the family dynamics, family functioning and any potential family difficulties that may impact the service user (Compton et al. 2005; Walton 2016; Zastrow 2010). The assessment will also highlight potential barriers to care that may be encountered during the patient's admission. For example, no known or traceable family may present as an obstacle in interventions and may delay discharge. Social workers may also have a task to play in terms of community-based assessments, for example, assessing resources in the community and community support for the individual, and assessing the suitability and safety of the community environment to which the patient will return (Compton et al. 2005; Walton 2016).

The comprehensive and holistic description of the individual and his or her circumstances is valuable to the overall care and treatment of the mental health care user. The outcome of the social work assessment will contribute to decisions taken by the multidisciplinary team and social worker about the interventions required for the mental health care users (Haines et al. 2018), for example, whether longer term care and treatment in a placement facility are required. Because these

decisions are high profile in that they may be life changing for a client and his or her family, sound and ethical professional judgement by the social worker during the assessment process is paramount (Vibeke & Turney 2017).

Intervention

The professional judgement of social workers will be exercised continually in service delivery in mental health care. Although professional judgements are *guided* by theoretical knowledge of intervention approaches (Cook 2016), generalised procedures and interventions cannot be used for all client systems. Vibeke and Turney (2017) highlight how professional judgement allows for individual discretion in decision-making and tailoring of interventions to best suit the client when generalist interventions may be inappropriate. For example, advocating on behalf of mental health care users is a broad intervention, and the professional judgement and discretion of the social worker will help determine what specific advocacy efforts will be required for an individual. There are several types of interventions the social worker can offer in mental health care.

In social work interventions, the service user is encouraged to be an active participant in the change process and is considered to be the expert in the professional relationship. The social worker's primary focus is to empower the service users and build on their existing strengths and capacities to address needs and achieve goals (Compton et al. 2005; Walsh 2009; Zastrow 2010). Social workers are equipped with a broad scope of expertise to intervene at individual, group and community levels of practice (Hepworth et al. 2010).

Individual counselling is a direct role a social worker can fulfil during the intervention process. Individual counselling begins by developing a working and trusting relationship with the client and then moves to an in-depth exploration of the presenting problems and potential solutions (Walsh 2009; Hepworth et al. 2010; Zastrow 2010). In mental health care, individual counselling may also include encouraging mental health care users to adhere to treatment regimes, and facilitating the adaption and acceptance of the services and interventions offered by the treating team (Carranza 2012). Social workers may also provide emotional support or supportive counselling to the mental health care user that focuses on creating a safe, supportive environment for individuals to express and disclose their most personal thoughts and feelings (Feltham 2006; Carranza 2012).

More formalised individual therapeutic interventions may also be offered by social workers in mental health care settings. Individual psychotherapy focuses on restructuring dysfunctional thoughts and patterns of behaviour, facilitating individual growth and development and addressing problems that are distressing or impacting an individual (Hannah 2005; Carranza 2012). Social workers may employ a range of theoretical approaches in therapy including dialectical behavioural therapy, cognitive behavioural therapy, narrative therapy and psychoanalytic therapy (Lindsay 2013). In the study done by Walton (2016), therapeutic services were not described as part of the function of the social worker, however, the social work participants noted that, given appropriate expertise and training, they could play a role in individual therapy with mental health care users.

Psychoeducation services offered by social workers are particularly important in mental health care. The purpose of psychoeducation is to increase awareness about psychiatric illnesses by exploring what the diagnosis means, the symptoms that present, the medication and related side effects, and ways of managing behaviour associated with the disorder (Carranza 2012). Psychoeducation can be provided at an individual, group, family and community level and is focused on developing insight, promoting adherence and enhancing awareness of mental illness (Lefley 2009; Walton 2016).

Social workers are also equipped to provide support and therapy to mental health care users' families, significant others or parents in psychiatric settings. Family-focused interventions consider 'interactional, behavioural and emotional problems' (Zastrow 2010: 31) in the family system that may exacerbate the symptoms or contribute to the difficulties faced by the mental health care user. Through family interventions, social workers may also explore and address family discord, difficult family relationships and dynamics, and dysfunctional patterns in the family unit (Carranza 2012; Walton 2016). The goal in family interventions is to improve family roles and relationships to ultimately enhance family functioning (Collins, Jordan & Coleman 2010). Supportive counselling can also be offered to families of mental health care users and can be a useful way of involving the family in the treatment process and providing families with an opportunity to explore the difficulties, fears and frustrations surrounding mental illness (Walker 2011; Walton 2016).

Parent counselling can form part of the social work intervention with families, particularly with families of child and adolescent mental health care users (Webb 2011). Parent counselling refers to a process of facilitating the development of effective and healthy parenting skills and styles and enhancing parental ability to more effectively relate to and interact with their children (Flisher & Gevers 2010; Manichander 2016; Walton 2016). The value of parent counselling is underpinned by the influence that early childhood experiences and parental attitudes, behaviours and approaches can have on individuals and their mental and emotional well-being (Meadow, Mok & Rosenberg 2007; Stein & Wilkinson 2007).

Group work interventions are commonly offered by social workers in psychiatric settings. These interventions have the purpose of facilitating social, behavioural and emotional adjustments that may help patients address and manage difficulties in their lives (Zastrow 2010). Group work with patients can be beneficial because patients with similar conditions can share their experiences, support one another and work collaboratively through common problems (Hepworth et al. 2010). Group work with families, partners or significant others of mental health care users is a beneficial, time effective way of including other social systems in the treatment process (Zastrow 2010).

Community-based interventions are also a valuable component of social work practice in mental health care settings. Psychoeducation and awareness raising are common community interventions in mental health care (Petersen & Govender 2010; Engstrom 2012). Walton (2016) found that providing outreach programmes to external institutions, communities and organisations such as schools, community clinics and child and youth care centres, is an important function of the social

worker in mental health care services. In addition, it was found that social workers were perceived to have unique skills and expertise to intervene at a community level (Walton 2016).

Direct social work interventions with individuals, groups, families and communities have a valuable role in the treatment and care of mental health care users, and are aimed at addressing the psychosocial factors that present in mental health difficulties (Flisher et al. 2012). Interventions at each of these levels are guided by continual professional judgements about the mental health care user and family, and the needs of these systems (Cook 2016). The helping process requires ongoing utilisation of professional judgements to inform decision-making about stages of interventions, appropriate approaches to use and possible needs that arise as the interventions unfold. The social worker's role extends beyond the individual's admission, to discharge and post-discharge care.

Discharge and post-discharge care

Social workers are involved in decisions regarding discharge and post-discharge care in mental health settings (Holliman, Dziegielewski & Datta 2001; Carranza 2012). Social workers' knowledge of communities and community resources means they are in a unique position to facilitate the discharge and post-discharge care of the patient (Aviram 2002; Hepworth et al. 2010). This knowledge allows social workers to help facilitate patients returning into their premorbid environments, and to ensure that patients can continue treatment in community contexts (Holliman et al. 2001; Hepworth et al. 2010). The importance of social work involvement at this stage has been reinforced by the move to deinstitutionalise mental health care users and to prioritise community-based mental health care services (Aviram 2002).

At discharge, social workers are able to link patients and families with community resources through referrals or liaison with other significant role players or institutions that may be involved in the continuity of care (Holliman et al. 2001; Walton 2016). Social workers can also advocate on behalf of patients for access to community resources such as social grants; social workers link the multidisciplinary team and the community resources to ensure ongoing support for the patient (Aviram 2002; Walton 2016). Discharge planning may involve elements of other interventions such as providing supportive counselling to patients and their families to prepare for the readjustment to the home environment or to address any reservations or anxieties about discharge (Holliman et al. 2001).

The role of social workers' professional judgements at discharge is particularly important because they are responsible for facilitating the successful reintegration of the patient back into the community. Discharge planning is a crucial task because a delay in discharge has significant financial implications for the patient or the institution, and can have an unnecessary pressure on hospital resources (Carranza 2012). Social workers must therefore be able to utilise their knowledge and expertise about the mental health care user and the community environment to make judgements about the discharge and the needs in terms of continuity of care (Aviram 2002). It can be argued that the discharge process and the post-discharge care of the mental health care

users and their families demand that social workers draw on theoretical and practical expertise to continually inform their judgements, decisions and actions in mental health care practice (Winch 2014). Decisions with regards to referral to, and linking with, community-based resources will require professional judgement by the social worker as to what will be suitable for service users and their needs.

Conclusions

The complexity of mental health care is underpinned by the dynamic interaction of several different biopsychosocial factors, which cause, precipitate and perpetuate mental health difficulties. The complex needs of mental health care users and the high-profile decisions that are required about the treatment and care of mental health care users reinforce the need for a multidisciplinary team approach. Professional judgement, underpinned by theoretical knowledge, professional experience and legislative frameworks related to mental health care, is crucial in guiding assessments and interventions provided by the multidisciplinary team.

To inculcate professional judgement during professional training of social workers requires the scaffolding of teaching and a blended approach to teaching across the four years of training, with a focus on the following areas (Council on Higher Education 2013):

- Development and consolidation of a professional identity.
- Instilling the ability to apply core values and principles of social work.
- Exposure to work with, and embrace, a range of diversities.
- Competence in the use of codes of ethics vis-á-vis the moral impulse.
- Introduction to theories that create knowledge and develop practice skills.
- Coaching to do holistic assessments and interventions with individuals, families, groups and communities.
- Awareness about different policies and legislation that influence practice.
- Stimulating interest in, and developing the ability to undertake, research.
- Facilitating the writing and communication of professional knowledge.

The unique knowledge and expertise of the social worker allows her or him to intervene at all levels of practice, and to address the psychosocial factors that contribute to mental health care at each of these levels. Carranza (2012: 106) argues that 'the social worker provides invaluable services that cannot be duplicated by other hospital personnel.' Social workers, therefore, have an imperative role in contributing to the holistic and comprehensive mental health care services offered by the multidisciplinary team. The interventions provided by social workers are informed by professional judgements about the mental health user and the relevant systems in his or her life. Despite the value that social workers' professional judgement has in the care and treatment of mental health care users, the contributions of social workers in these contexts are not always well recognised or understood. This often leads to role confusion, overlap and an underutilisation of social work skills (Walton 2016). Further research into the role of social workers in mental health

care in South Africa is needed to establish their role in this field, improve social work professional training and, ultimately, enhance service delivery in these contexts. The array of functions that social workers can fulfil, and the contribution of their interventions to the care of service users, is indicative of the need for this profession in the field of mental health (Aviram 2002).

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