

# Gender, HIV/AIDS and the Status of Teachers

Report of the Third Commonwealth Teachers' Research Symposium

Pestana Rovuma Hotel, Maputo, Mozambique 19—21 February 2008

Convened by the Commonwealth Secretariat in association with Education International

Report

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**Foreword** 

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Mr Dennis Sinyolo Co-ordinator, Education International

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The report of the Third Commonwealth Teacher Research Symposium is dedicated to the memory of

#### **Steve Sinnott**

who advocated relentlessly for the rights of Commonwealth teachers and gave the moral support of the National Union of Teachers to research for their professional advancement and development



1951 - 2008

General Secretary, National Union of Teachers (2004 — 2008)

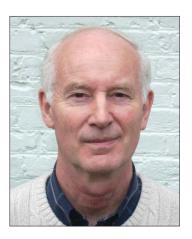
Convenor, Commonwealth Teacher's Group (2002 — 2008)

Chairperson, Commonwealth Working Group on the Professional Development of Teachers (2004 — 2008)

"...as a teacher in my soul, I remind young people joining teaching that they are to be part of the best and most important of all professions. I say to them that when they make promises to children they should not break them. The same must apply to governments. No breaking of the promise of Universal Primary Education — all children in school by 2015. Every child in the world should be able to claim their right to education"

- Steve Sinnott, Commonwealth Public Lecture, Sierra Leone, November 2005

### **Foreword**



UNAIDS figures for 2007 estimate that 68 per cent of the global total of 33.2 million people living with HIV/AIDS are in sub-Saharan Africa. In spite of international attention, this is a pandemic which is still out of control. HIV/AIDS is a life-threatening illness which has a particular impact on children and teachers. It challenges the global ambition to provide a worthwhile education for all.

It was therefore appropriate that the latest research symposium in the series established after the adoption of the ground-breaking

Commonwealth Teacher Recruitment Protocol in 2004 should take place in southern Africa. The symposium was not restricted to the issues of teacher loss and combating stigma, but also discussed how the education system itself can inoculate societies against the stress and despair surrounding HIV. Support for testing and positive living can start with teachers in schools and influence whole communities.

Findings shared at the symposium included the importance of peer group work among teachers, the radical drop in levels of infection in countries such as Kenya, and the key role of rights, education and equality for women. This report will be of interest to education ministries and educators throughout the Commonwealth. It is important that it is followed up at the 17th Conference of Commonwealth Education Ministers (17CCEM) and its associated civil society conference, which will take place in Malaysia in June 2009.

The peoples of Commonwealth countries have borne a disproportionate amount of the suffering arising from HIV/AIDS. The Commonwealth, therefore, can lead the world in finding evidence-based solutions.

#### **Richard Bourne**

## **Executive Summary**

From 19 to 21 February 2008, researchers from Ghana, Jamaica, Kenya, Mozambique, South Africa, the United Kingdom and Zambia participated in the third Commonwealth Teacher Research Symposium organised by the Commonwealth Secretariat in collaboration with Education International (EI), the umbrella organisation that represents the world's teachers' unions. They exchanged findings on gender, HIV/AIDS and the status of teachers. The symposium was held in Maputo, Mozambique — the first time it has taken place outside the UK.

The meeting was opened by Ms Maria Albertina da Conceição Bila, Permanent Secretary of the Ministry of Education and Culture of Mozambique, who highlighted the role that teachers are playing in countries combating HIV/AIDS. In Kenya, where infection rates fell from 14 per cent in 2000 to 5.1 per cent in 2006, 10,000 teachers have been trained in AIDS awareness and have carried the message to 400,000 parents.

In his keynote speech, Professor Michael Kelly of the University of Zambia pointed out that HIV infection rates in the Commonwealth are twice the world average and that there are 9 million orphaned children in African Commonwealth countries. He argued that HIV reflects the subordination of women and violence against them.

Mr Dennis Sinyolo, El Education Co-ordinator, reported on a survey of six Commonwealth countries — The Gambia, Kenya, Lesotho, Tanzania, Uganda and Zambia — which found that the average rate of loss of teachers from AIDS was 4 per cent, and that with an acute shortage of teachers in most areas it would be difficult for these countries to achieve the 2015 Millennium Development Goals (MDGs). In lively exchanges the participants focused on issues such as:

- The need to overcome stigma, so that education workers are not afraid of AIDS testing or of losing their jobs if they test positive;
- The need for positive support, including financial help and food allowances, for sufferers and their families;
- A recognition that while only a minority may be infected, everyone is affected;
- An understanding that HIV/AIDS hits women hardest—a woman is seven times more likely to catch the disease from a man than vice versa, and 61 per cent of all adults infected are women;
- The role of peer educators in helping to overcome stigma and of teachers in changing community attitudes.

At the conclusion of the symposium, it was decided that a report, which would include a compilation of the proceedings and selected research papers, would be circulated to all ministries of education in the Commonwealth, teachers' unions and other interested partners.

## Recommendations of the Symposium

The recommendations of the third Commonwealth Teacher Research Symposium fell under three headings: HIV/AIDS, the status of teachers and the implementation of the *Commonwealth Teacher Recruitment Protocol* (CTRP). The following is a summary of the recommendations.

#### HIV/AIDS

- 1 Workers living with HIV should be more involved in the planning, implementation, monitoring and evaluation of HIV/AIDS programmes; such workers must have free access to treatment and all other facilities relevant to their health status.
- 2 Employers need to find a solution to the problem of pension payments for teachers who die from AIDS-related illnesses before they reach pensionable age. Their families and orphaned children need the benefit of their pensions.
- 3 Unions should scale up HIV/AIDS education and support programmes for their members and students in order to reduce the impact of the pandemic on the education sector. The El's Education for AIDS (EFAIDS) programme, launched in January 2006, should be expanded to reach as many people as possible within the shortest period of time.

#### Status of teachers

4 Regional and international financial institutions are urged to stop supporting or encouraging the recruitment of unqualified, contract or para-teachers, as this has a negative affect on the quality of education. The setting of unrealistic targets for recipient countries, and caps on teacher establishments and educators' salaries should be avoided. The Fast Track

- Initiative (FTI) norm, which sets teachers' salaries at 3.5 times per capita GDP, suggested in the Education for All (EFA) Indicative Framework, should not be used as a barrier to salary increases.
- Regional and international financial institutions should continue to support educational programmes, including access to early childhood education (ECE) programmes, free primary education and good quality secondary and tertiary education, teacher training, institutional capacity building and other progressive educational initiatives.
- 6 Governments must recruit more teachers in order to meet the EFA targets and education- related MDGs. This may call for the raising of a country's teacher stock in line with enrolment trends, in order to keep pupil-teacher ratios consistent with international norms and standards.
- 7 The recruitment of unqualified teachers should end, and training and recruitment of more qualified teachers should be expedited. In-service training should be targeted at unqualified and underqualified teachers who are already employed in schools. Such training programmes should focus on school leadership, information and communication technologies (ICT), and other specific subject areas and pedagogy.
- 8 As an interim measure to address the need to protect unqualified teachers, teachers' unions should recruit them into membership and make representations to governments on their behalf, with a view to their becoming fully qualified.
- 9 Governments should set up, or improve upon, existing collective bargaining structures and systems. These should be

- fully grounded in International Labour Organization (ILO) conventions and conform to international labour standards and norms.
- 10 Governments must seek to regularise paydays, where necessary, in order to reduce teacher absenteeism and minimise disruption and inconvenience to teachers and other education employees. Since most salary delays seem to occur where teachers' salaries are paid through local authorities, governments should consider centralising the payment of salaries. This could be done electronically through the banks.
- 11 Teachers' salaries and other conditions of service should be improved, including accommodation and incentives to attract teachers to remote rural areas. Efforts should be made to improve the status of teaching and to make the teaching profession attractive to the best school leavers.
- 12 Ministries of education must engage with teacher unions, associations and organisations, and consult with them on education, labour and other relevant issues in a structured way. Such institutionalised dialogue enriches education policies and ensures ownership on the part of the unions.
- 13 Teachers' unions should strongly oppose the introduction or continuation of crash programmes such as the Distance Teacher Education Programme (DTEP) in Lesotho and the licencee teacher programme in Tanzania.
- 14 Unions must collaborate and work closely with civil society organisations and other bodies, particularly the EFA country

coalitions, with UN agencies such as the UN Economic and Social Council (UNESCO) and UN Children's Fund (UNICEF), and with the World Bank and other organisations in promoting quality public education for all.

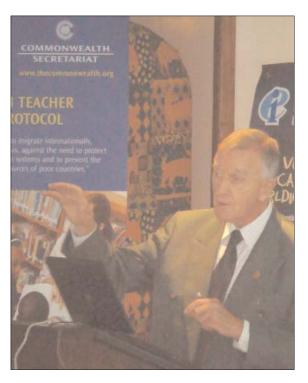
## Commonwealth Teacher Recruitment Protocol

- 15 There is a major need for stronger regulation of recruiters of teachers and their clients public and private schools and local education authorities through the implementation of the CTRP by all Commonwealth member governments and other relevant parties within and beyond the Commonwealth.
- 16 Promotion of the 'brain circulation' to counteract brain drain should be encouraged in order to enable migrant teachers to return to their country of origin.
- 17 'Brain waste' should be minimised through the promotion of international recognition and professional registration of teachers and their qualifications, thereby preventing the loss of teachers when they are obliged to find work that is not commensurate with their academic qualifications because these are not recognised by the recruiting country.
- 18 Recruiting governments need to provide some form of compensation when they siphon off large numbers of teacher recruits from poor and developing countries.
- 19 Acceleration of the dissemination of information to all teachers about the existence and provisions of the CTRP is needed for their protection.

## Opening of the Symposium: Background and Introduction

The Chair of the opening ceremony, Dr Roli Degazon-Johnson, Education Adviser at the Commonwealth Secretariat, welcomed local and foreign participants. She explained that the symposium was the third in a series launched in 2006 that focused on the single most critical human resource for the achievement of education goals — the teacher. The symposia had been held in direct response to the request of Commonwealth ministers of education for research that monitored the status and mobility of teachers since 2004, when the Commonwealth Teacher Recruitment Protocol was adopted. Dr Degazon-Johnson advised that the outputs of the first symposium informed a report tabled at the 16th Conference of Commonwealth Education Ministers (16CCEM), held in Cape Town, South Africa in December 2006. The second symposium, held in March 2007, saw for the first time the participation of the Education Sector Bureau of the Organisation of Economic Co-operation and Development (OECD) and brought to the table research on teacher qualifications and professional registration presented by the South African Qualifications Authority (SAQA). This third symposium was being held for the first time in a developing Commonwealth country, in conjunction with Education International and with the assistance and support of the Ministry of Education and Culture of Mozambique.

Mr Dennis Sinyolo, Education Co-ordinator at Education International delivered a brief message of welcome, noting that EI was a global union confederation of organisations representing 30 million teachers worldwide. He acknowledged the collaboration and partnership with the Commonwealth Secretariat education programme that had led to this joint initiative. Welcome messages were also given by Mr Alipio Siquisse, Secretary General of the Mozambique National Organisation of Teachers (ONP) and Ms Samidha Garg of the UK National Union of



Father Michael Kelly

Teachers (NUT) and Commonwealth Teachers Group. UNESCO's Representative in Mozambique, Mr Benoit Sossou, stated that the available evidence indicated that HIV/AIDS was exacerbating the gender-based disparities that already existed in the education sector. For the most part, this put girls at a disadvantage in accessing quality education and put women at a disadvantage in finding employment opportunities as educators and administrators. As a result, HIV/AIDS was affecting the aim of achieving not only education for all, but also gender equity, by 2015.

The symposium was then formally declared open by the Permanent Secretary in the Ministry of Education and Culture of Mozambique, Ms Maria Albertina da Conceição Bila, who said that it was a singular honour that Mozambique had been chosen as the venue for the symposium. She highlighted aspects of the current education policy being implemented by her ministry. Among these

was a strategy of 'positive discrimination' to encourage women to join the teaching profession. This had been successful both in helping Mozambican women realise that teaching did not have to be a male-dominated profession and in showing that women teachers could act as role models in their communities, encouraging girls to enrol in school and improve their educational qualifications.

Professor Michael Kelly, Jesuit priest and internationally recognised champion of education as the most effective vaccine against HIV/AIDS, was invited to present the keynote address. Professor Kelly came to Zambia from Ireland in 1955 and taught at all levels of the education system before becoming Professor of Education, Dean of the Faculty of Education and Deputy Vice Chancellor of the University of Zambia, posts which he held at various times between 1975 and 2002. The Chair stated that Professor Kelly was the author of numerous publications, including Planning for Education in the Context of HIV/AIDS, HIV/AIDS and Education in the Caribbean and Challenging the Challenger. She said that Professor Kelly had received the Association of Commonwealth Universities Award for

Distinguished Service for his contribution to work on the relationship between education and HIV/AIDS, and honorary doctorates from the University of the West Indies and University College Dublin, Ireland.

Professor Kelly presented a wide-ranging address on the symposium theme of 'Gender, HIV/AIDS and the Status of Teachers'. He said that the Commonwealth was the world's most seriously infected grouping of countries and that although it contained less than one-third of the world's population, at the beginning of 2006 it accounted for almost two-thirds of people living with HIV. On the basis of data for individual Commonwealth countries in the 2006 Report on the Global AIDS Epidemic, 1 the HIV infection rate across Commonwealth countries was approximately 1.2 per cent, compared with a global figure of 0.6 per cent. This meant that 12 of every 1,000 people in Commonwealth countries were living with HIV.

Noting that slightly more than half of those infected are women, Professor Kelly said that female infection rates were much higher in sub-Saharan Africa, where 59 per cent of adults living with HIV were women and there were 14 HIV-positive adult women for every 10

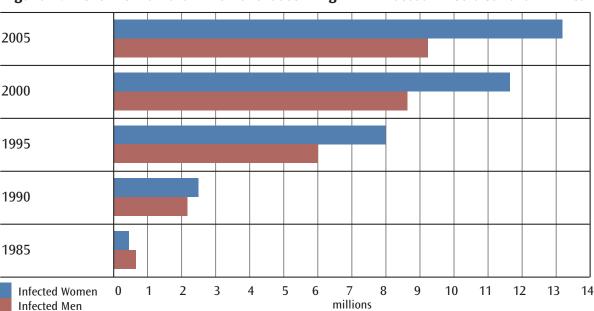


Figure 1: More Women than Men are becoming HIV Infected in Sub-Saharan Africa

<sup>1</sup> Report on the Global AIDS Epidemic. Geneva: UNAIDS, June 2006.

men. He pointed out that this situation had implications for the teaching profession and the delivery of educational services, since a high percentage of teachers, especially those in pre-schools and primary schools, were female. He said that HIV/AIDS affected women and men in different ways. On physiological and health grounds, women were at a higher risk of infection; physiological and health factors made HIV transmission from men to women seven times more likely than transmission from women to men.

Turning to gender inequality in the area of sexual expectations, he expressed the view that gender-conditioned behaviour compounded the biological vulnerability of women. He said that although the documentation was not very precise, as many as 50 per cent of schoolchildren in some countries reported having been physically or sexually assaulted while at school. Pupil abuse tended to be inflicted mostly by male teachers on girls, although cases had been reported of boys being abused by both male and female teachers.

Professor Kelly quoted Albert Einstein's maxim: 'What can be counted does not necessarily count, what counts cannot necessarily be counted'. He proposed that in the context of

HIV/AIDS and teachers, what really counted might be teacher status in relation to the epidemic, the multiple demands on female teachers, protecting educational quality, the sexual norms and expectations of society, and the culture within the school.

Pointing to the evidence of teachers who were victims of HIV/AIDS, Professor Kelly noted that a survey conducted in 2004 found that 12.7 per cent of over 17,000 teachers who gave specimens for testing were HIV positive.<sup>2</sup> This was similar to the prevalence rate in the general population. However, unlike the situation in the general population, HIV prevalence rates among men and women educators were the same. He called for national level HIV surveys in other countries to disaggregate the information on teachers so that there could be better understanding on whether or not teachers constituted a special category that was at high risk of HIV infection. He also indicated that teacher mortality due to AIDS did not much differ from rates for other similar occupational groups, nor did mortality rates for teachers seem to be unduly high. Notwithstanding this, in some countries male teachers had a higher mortality rate than female teachers, even though female teachers were more likely to be HIV-positive. (For the full text of the keynote address see Appendix 1.)

<sup>2</sup> HIV Prevalence among South African Educators in Public Schools, Fact Sheet No. 6, Human Sciences Research Council (HSRC) and Medical Research Council (MRC) of South Africa, 2005.

## Session 1: Teacher Mobility, Gender and Status, I

The Chair, Mr Richard Bourne, Senior Research Fellow at the Institute of Commonwealth Studies, University of London, opened the session and introduced the two presenters, Mr Dennis Sinyolo and Dr Roli Degazon-Johnson.

Mr Sinyolo presented his research on teacher supply, recruitment and retention in six sub-Saharan Anglophone countries. He said that one of the strategies adopted by the forum to achieve the EFA goals, as set out in the 2000 Dakar Framework, was to 'identify, train and retain good teachers ...',3 but unfortunately some countries had ignored the importance of having qualified teachers and decided to employ unqualified, volunteer, contract or para-teachers. These teachers generally had the minimum, if any, teacher training, and were normally hired locally and paid by the community. Such teachers were sometimes employed on the advice of international financial institutions like the International



Left to right: Helena Awurusa, National Gender and HIV/AIDS Coordinator, Ghana National Union of Teachers; Lulame Nare, Head of Department, Gender Unit, South Africa Democratic Teachers Union and Dennis Sinyolo, Co-ordinator, Education and Employment, Education International

Monetary Fund (IMF) and the World Bank as a way of controlling or reducing education budgets and government expenditure.

Table 1: Participating countries at a glance (2005)

	The Gambia	Kenya	Lesotho	Tanzania	Uganda	Zambia
Population, total (millions)	1.5	34.3	1.8	38.3	28.8	11.7
Population growth (annual %)	2.6	2.3	-0.2	1.8	3.5	1.6
Surface area (sq. km '000))	11.3	580.4	30.4	945.1	241.0	752.6
Life expectancy at birth, total (years)	56.3	48.3	35.6	46.2	48.9	38.1
Infant mortality rate (per 1,000 live births)	89.0	78.5	80.0	78.4	80.2	102.0
Youth female literacy rate (% of females aged 15—24)	-	80.7	-	76.2	71.2	66.2
GNI (current US\$ billion)	0.4	18.0	1.8	12.1	8.5	6.7
GNI per capita, Atlas method (current US\$)	290.0	530.0	960.0	340.0	280.0	490.0
Prevalence of HIV, total (% of population aged 15—49)	2.4	6.1	23.2	6.5	6.7	17.0

Source: World Development Report, World Bank, 2005

<sup>3</sup> The Dakar Framework for Action, Dakar, 2000, p. 20.

Mr Sinyolo said that the overall goal of the survey was to investigate various issues that affect the recruitment, supply and retention of qualified teachers in The Gambia, Kenya, Lesotho, Tanzania, Uganda and Zambia. The methodology utilised a desk study, a questionnaire, and country visits and meetings, combined with discussions and interviews.

The main findings of the survey were:

- Teacher supply: Four of the six countries, The Gambia, Lesotho, Tanzania and Uganda, had a shortage of qualified teachers. The shortage affected both primary and secondary schools. For example, in Lesotho in 2006 44 per cent of primary school teachers and 42 per cent of secondary school teachers were unqualified.
- Teacher attrition: The average rate of teacher attrition in the six countries was 4 per cent. Most of the attrition is attributed to retirement, resignation, death and dismissal. Many respondents felt that deaths due to AIDS-related illnesses had contributed to the high rate of attrition, especially in Lesotho and Zambia.
- Brain drain: Brain drain has also contributed to the high level of teacher attrition in Zambia, particularly at secondary level. The main cause of brain drain was cited as low salaries and poor conditions of service. The best way of reducing teacher attrition would be to address its root causes, particularly HIV/AIDS, low salaries and poor working conditions.
- ◆ Teacher remuneration and motivation: The survey revealed that teachers' salaries were generally low and below the poverty datum line or cost of living. Conditions of service were also poor and many schools had no accommodation, or inadequate accommodation, for teachers. The situation was even worse for unqualified teachers, most of whom earned 40—60 per cent of the salary of the lowest-paid qualified teacher.
- Teacher absenteeism: Teacher absenteeism was reported to be a problem (but not a

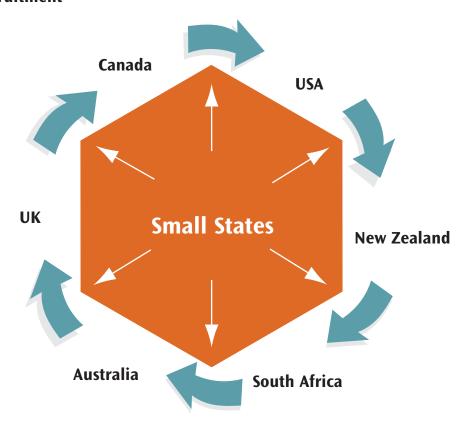
- major one) in 50 per cent of the countries (Lesotho, Tanzania and Zambia). The main causes were irregular paydays (e.g. in Tanzania and Zambia) and illness, probably related to HIV/AIDS. Teachers from rural areas usually travelled to urban areas or district centres to collect their pay and this took up to three or more days, especially when the processing of salaries was delayed.
- Union involvement in policy development: In countries like The Gambia, Kenya and Uganda, the involvement of the union is provided for in the country's legal statutes, such as the Education Act or in education policy papers or plans. Generally, all the unions were working closely with civil society organisations such as EFA country coalitions, and this strengthened their ability to influence education policy.

(For the full text and recommendations of the paper see Appendix 2.)

Dr Degazon-Johnson presented her paper, entitled 'An Overview of Commonwealth Teacher Mobility, Recruitment and Migration', moving from the country-specific findings of the first paper to the bigger picture of teacher mobility and recruitment in a broader pan-Commonwealth perspective. She began by providing a brief summary of the Commonwealth's make-up as a unique family of 53 developing and developed nations, encompassing 2 billion people — 30 per cent of the world's population. The Commonwealth spanned every continent, many races, faiths, languages and cultures, and had shared values relating to democracy, good governance, human rights and the rule of law. In focusing attention specifically on the Secretariat's education, health and gender programmes, she noted that these activities, undertaken through its Social Transformation Programmes Division (STPD), supported the MDGs on achieving universal primary education and gender equality in education by 2015.

Addressing the research on teachers which the Commonwealth education programme had undertaken since the adoption of the CTRP in

Figure 2: The 'Migration Merry-Go-Round' — the reality in Commonwealth teacher recruitment



2004, Dr Degazon-Johnson discussed the 'Migration Merry-Go-Round' which recent Secretariat studies among teachers, doctors and nurses had revealed, noting that migration and development had now become an international concern that had been taken up at the UN. She argued that the impact of migration on development in certain contexts had yielded brain drain and waste, and that factors such as unethical recruitment practices, the de facto utilisation and deployment of remittances, and other economic and social push-pull factors made it apparent that migration was a multifaceted phenomenon — positive for some countries. but not for all. She noted the work of the Secretariat in developing Commonwealth instruments in response to the requests of health and education ministers, specifically the International Code of Practice for the Recruitment of Health Workers (2003) and the Commonwealth Teacher Recruitment Protocol (2004). She emphasised that while these instruments did not seek to restrict the free movement of labour, they did seek to balance the rights of the highly skilled to free

movement and migration against the need to prevent erosion of the development process in poor countries and the exploitation of scarce human resources in those countries.

Addressing qualitative data obtained from member countries, she advised that in the Pacific, Samoa lost teachers through recruitment to New Zealand, where they were employed as bus drivers and prison warders. Cameroon lost its bilingual teachers to China and Canada, and Kenya, which had an oversupply of trained qualified teachers, organised structured recruitment programmes with Rwanda, Seychelles and Sudan. Small states in the Caribbean, Africa, Europe and the Pacific, which comprised three-fifths of Commonwealth countries, experienced the most detrimental effects of human capital loss of teachers. Jamaica, with a population of under 3 million, lost nearly 1,000 teachers to the UK between 2001 and 2003. Guyana trained 300 teachers every year and lost the same number through migration. In the Caribbean region, 70 per cent of those who completed tertiary education migrated to industrialised countries.



Dr Roli Degazon-Johnson

Dr Degazon-Johnson reported on interviews conducted with 66 Commonwealth recruited teachers during 2006.<sup>4</sup> The interviewees had been identified with the assistance of the Commonwealth Teachers Group. The concerns and issues that they raised included:

- The positive experiences provided by Botswana
- The unethical treatment meted out to teachers by some recruitment agencies
- Poor promotion prospects
- Challenges encountered in supply teaching

- Lack of recognition of qualifications, which affected pay levels
- Lack of knowledge about the CTRP by 90 per cent of the teachers interviewed.

Symposium participants were also informed about the findings of a quantitative study based on data drawn from 17 Commonwealth countries during 2006 which revealed that there were high turnover levels and low levels of retention among their teaching cohorts, and that more male than female teachers appeared to be leaving the profession. Female, rather than male, teachers were filling the vacancies created by male teachers' departure.

Concluding her presentation, Dr Degazon-Johnson highlighted policies and programme initiatives which could be undertaken by government and teacher organisations to create an environment that was conducive to teacher retention. They included:

- The promotion of brain circulation to encourage migrant teachers to return to their country of origin;
- Minimising brain waste through the promotion of international recognition and professional registration of teachers and their qualifications;
- The need for 'consideration' to be provided by richer countries when they recruited large numbers of teachers from poor and developing countries;
- Dissemination of information to all teachers about the existence and provisions of the CTRP.

<sup>4</sup> From South Africa, Australia, New Zealand, UK, Botswana, Canada and the USA.

## Session 2: Teacher Mobility, Gender and Status, II

Ms Samidha Garg, who chaired the second session, invited Dr Paul Miller and Dr Roli Degazon-Johnson to continue discussion of the theme of teacher mobility, gender and status. Dr Miller presented a paper entitled 'Migrant, Male and Married', a personal case study of his experiences as a teacher recruited to work in the European Union.

He began by addressing some of the factors behind teacher migration:

- Direct recruitment or head-hunting conducted by recruitment agencies and head teachers;
- Voluntary migration, when the teacher decided to travel to another country at their own cost and seek employment on their own initiative;
- Forced migration, when although they might prefer to remain in their country of origin, civil unrest, famine, disease or threat of torture impelled a teacher to leave;
- Migration for reasons of family reunification, when a spouse and children joined an already relocated partner (Hutchings, 2002).

He argued that organised and comprehensive orientation and induction of newly recruited teachers was essential and pivotal to their early and continued success in their new country. Such orientation should focus on:

- Teachers' rights and responsibilities;
- Support mechanisms available from local authorities, trade unions and community organisations;
- System-specific approaches to teaching methodology and pedagogy;
- Classroom management of pupil behaviour;
- Opportunities for training and professional development.



Ms Samidha Garg

He said that his five-day orientation exercise did not focus on any of these, but showed him how to use the interactive whiteboard, which was very useful, provided some pupil data, which was not of use until much later, and showed him how to buy a bus pass and travel card.

While acknowledging that in some countries the required qualification for teaching is a teaching diploma, Dr Miller said that unless they had undertaken teacher training in the UK, or had a qualification considered to be the equivalent of a UK Bachelor's degree, recruited teachers were treated as unqualified teachers. If their qualifications were equivalent to the General Certificate of Secondary Education (GCSE) at grade C, or a higher level in Mathematics and English, they might receive a waiver, but in the case of science subjects, this would be considered only if the teacher was born after 1 September 1979 and intended to teach in a primary school. Successful completion of a training course (for example, the Overseas Trained

Teacher Programme, the Recruited Teacher Programme or the General Teaching Programme), which led to qualified teacher status (QTS), was the sole basis on which a teacher recruited overseas could be considered to be qualified and receive the benefits of a UK trained teacher. Dr Miller's experience was that he was not given this information before he was recruited to teach in the UK.

Gaining access to QTS courses could be further complicated by the decisions of the UK National Assessment Resource Information Centre's (NARIC) comparability assessment of an individual teacher's qualifications. In Mr Miller's case, NARIC found no comparison for his Bachelor's degree, but equated his Master's degree in business administration to a UK Master's degree. There were only a limited number of places on QTS courses. In 2006, 6,800 QTS training places were available across England. Of these, 1,670 were filled by teachers trained overseas (DfES, Form 618G survey). Dr Miller also said that the preferences of the principal or head teacher could also play a major role in decisions regarding pay and admission to a QTS course. Since he had obtained qualified teacher status, he had been promoted to Head of Economics and Business Studies in his school, but other teachers had not been so fortunate.

Dr Miller then addressed the specific challenges faced by male teachers who were foreigners. They felt vulnerable and at risk of accusations of sexual or other forms of misconduct. He argued that while every teacher was at risk of being accused of misdemeanours such as assaulting a student, he felt that as a male teacher, he faced twice the risk, and as a male migrant three times the risk. This might be a consequence of racism or the personality make-up and experiences of the person responsible for the accusation. He said, for example, that in trying to break up a fight between two 8-year old pupils, he had been turned on and assaulted in his own classroom. At another school in June 2006, coincidentally on the same day that he was awarded his QTS, a female pupil whom he had asked to leave the classroom stated that he had 'touched' her in an

unacceptable manner. This was still the darkest day in his teaching career. The following Monday, he was called to a meeting where written allegations and statements were put in front of him. However, after four months of investigation by the police and the child protection department, he was cleared.

In reflecting on his experience as a black male teacher, Dr Miller said that at primary level such teachers are in short supply, especially in positions of leadership. Secondly, black boys from Africa and the Caribbean were more at risk of academic failure than students from other ethnic groups. He noted that various theories, including a lack of effective role models, have been proposed to explain this. He was quite certain that his own recruitment was based on two premises: the shortage of UK teachers in the geographical area to which he moved; and the demand for teachers who could be role models and provide academic support for boys from the Caribbean and Africa.

Concluding his presentation, Dr Miller noted that during his time as a teacher in the UK he had mentored black boys and acted as an academic mentor for white female pupils. In his opinion, interaction with white pupils provided an important lense through which to understand the nuances of English culture. His interactions with black boys had provided an opportunity for them to identify with, retain and even create an 'identity of blackness' based around a 'migrant identity' and around an 'ethnic (black) identity'.

Table 2: UK teacher ethnicity, 2007

Group	2007	2006
White	94.6%	94.8%
Mixed	0.7%	0.7%
Asian or Asian British	2.4%	2.2%
Black or Black British	1.7%	1.7%

**Source:** SFR 15/2007

The increase in the percentage of teachers from minority ethnic (non-white) groups was greatest in London, 17.8 per cent in 2007 compared to 17.4 per cent in 2006.

Table 3: Composition of the UK teaching force, 2007

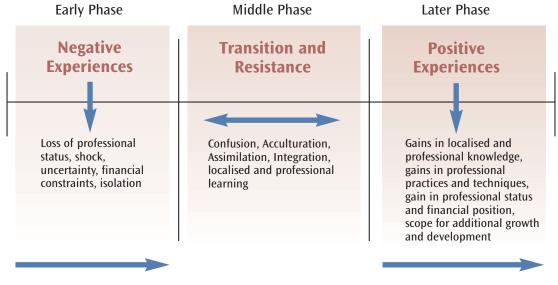
Total number of teachers (2007)	437,800	600 less than previous year	Male (000's)	Female
Nursery/ Primary	196,900	1200 less than previous year	16% or 31,504	84% or (165,396)
Secondary	216,700	400 more than previous year	43% or 93,181	57% or (123,519)
Special schools and PRUs	21,000	200 more previous year	N/A	N/A
Academies	3,200		N/A	N/A

**Source:** DSCF, Form 618G survey, SFR 15/2007 and TDA 2007.

In conclusion, Dr Miller reflected that many migrant teachers had received support from local religious organisations and other civic groups in the UK, as well from trade unions, including the NUT. He posited a migration trajectory which presented the professional and other adjustments that the newly recruited teacher might expect to make. The first phase prepared the overseas trained teacher (OTT) for phase 2. In phase 2, integration was increased or restricted by the extent of prior localised knowledge (professional or otherwise) and experiences, or by the pervasive nature of experiences (often negative ones) in the

previous phase. Phase 2 was the most crucial and OTTs might return to this stage several times, even after moving on to phase 3. Finally, in phase 3 (four or more years after coming to the UK), the OTT was expected to become 'properly' located within the system. This period would be facilitated if there was a successful period of induction, acquisition of localised knowledge, learning, development, integration and acculturation. At this stage, the OTT could expect to derive the best rewards (promotion, learning and other opportunities) and make their most effective professional contribution to the host system (Figure 3).

Figure 3: Overseas trained teacher's identity trajectory



Source: Paul Miller, 2006

In the second presentation, Dr Degazon-Johnson highlighted aspects of her paper entitled 'Issues of Gender and Ethnicity in Commonwealth Teacher Recruitment and Migration — The Case of 12 Teachers'. She cited evidence that in the UK during the five-year period 1999—2003 there was targeted recruitment resulting in large scale migration of teachers from a number of Commonwealth countries in Africa. Asia and the Caribbean. These recruitment campaigns were undertaken principally to address a shortfall of teachers in the UK in general, and in England in particular. Studies by Ochs (2003) revealed that over the three-year period 2000—2002, a high volume of work permits were provided by the UK Home Office for teachers from countries such as Zimbabwe (898), Ghana (457), India (457), Canada (898), South Africa (4,702) and even small Caribbean states such as Jamaica (974).

Her study of Commonwealth teacher mobility and migration specifically concerned the experiences of 12 teachers, 11 of whom were recruited to the UK during the period 2000—2004, which immediately preceded the adoption of the CTRP by ministers of education at a meeting held at Stoke Rochford, UK in 2004. The purpose of the study was to determine the kinds of experiences that Commonwealth teachers were exposed to by recruitment agencies, businesses and schools. She sought to learn from Commonwealth teachers themselves about their experiences through a combination of interviews and focus groups. The research methodology was mainly qualitative, developing case histories from the personal experiences of subjects taken from a distinct population group, teachers from Commonwealth member countries.

Table 4: Profile of qualifications and teaching experience of a sample of Commonwealth teachers recruited by UK recruitment agencies and businesses, 2001-2003 (N = 12)

Case	Pseudonym	Gender	Country of origin	Years of teaching	Academic qualifications
1.	Alfred	Male	Zimbabwe	14	Bachelor's degree and post-graduate diploma
2.	Aurora	Female	UK	10	Master's degree
3	David	Male	India	17	Master's degree
4.	Julius	Male	Uganda	19	Bachelor's degree and post-graduate diploma
5.	Larry	Male	Zimbabwe	10	Master's degree
6.	Mutwa	Male	Kenya	4	Bachelor's degree
7.	Ntombi	Female	South Africa	15	Bachelor's degree and post-graduate diploma
8.	Penelope	Female	Kenya	3	Bachelor's degree
9.	Sarah"	Female	Botswana	2	Bachelor's degree and post-graduate diploma
10.	Slakisha	Female	Jamaica	10	Bachelor's degree and post-graduate diploma
11.	Sonia	Female	Jamaica	18	Bachelor's degree and post-graduate diploma
12	Sylvester	Male	Kenya	4	Bachelor's degree

Note: Names are pseudonyms used to protect teachers' anonymity.



Participants and presenters at the Symposium

Of the four UK-based recruitment agencies or businesses involved, Agency ABC (a pseudonym) stood out because of the number of unethical practices to which it subjected recruited teachers. Agency ABC breached its contractual obligations by:

- Offering an annual salary and bonus to teachers to which the agency failed to adhere;
- Unilaterally coercing recruits into changing their contract mid-year without their prior knowledge or agreement, and rescinding one-year contractual agreements;
- Changing the emoluments by at first agreeing to pay a fixed salary, whether or not teachers were working, thereby treating them as employees of the agency, only to change this after a matter of months to payment only for days worked;

- Using the threat of withdrawal of UK Home Office work permits to coerce teachers into accepting new terms;
- Apparently misleading recruits by giving the impression that supply teaching was a temporary arrangement which would lead to a permanent jobs, when there is some evidence that the agency sought to prevent some teachers from obtaining a permanent appointment, as this would have led to loss of revenue;
- Charging a fee for finding accommodation and then providing accommodation that was grossly sub-standard.

Dr Degazon-Johnson concluded her presentation by acknowledging the tremendous contribution to the welfare of teachers recruited from overseas made by the NUT, which was also the convener of the Commonwealth Teachers Group. She expressed her pleasure at the outstanding initiative of Commonwealth ministers of education, who developed and created the CTRP for the protection of teachers, a critical human resource.

(For the full text of the presentation see Appendix 3.)

The first day of the symposium concluded with the launch of *Teacher Supply, Recruitment and Retention in Six Sub-Saharan African Countries* by Dennis Sinyolo, published by Education International.

## Session 3: The Impact of HIV/AIDS on Education and the Teaching Profession, I

Mr Dennis Sinyolo welcomed participants to the second day of the symposium, which focused on the impact of HIV/AIDS on education and the teaching profession. Introducing the presenters, he explained that in collaboration with strategic partners, EI had initiated an Education for AIDS programme through the unions in several regions. Ms Helena Awurasa, the EFAIDS co-ordinator for the Ghana National Association of Teachers (GNAT), and Ms Lulama Nare, Head of the Gender Department of the South African Democratic Teachers Union (SADTU), made presentations on aspects of their research, which had informed the EFAIDS programme in those countries.

Ms Awurasa began her presentation, 'An Assessment of the Awareness of HIV/AIDS in the Educational Sector and the Needs of Teachers and Education Workers Living with HIV/AIDS in Ghana', by explaining that the prevalence of HIV/AIDS in Ghana was 3 per cent — one of the lowest rates in sub-Saharan Africa. She said data on the sub-Saharan region showed that in 2006 there were 14 HIVpositive women for every ten HIV-positive men. However, of a total Ghanaian population of 22.5 million, approximately 500,000 people were living with HIV/AIDS. Further, of the 220,000 teachers and education workers in Ghana, it would be a fair assumption that some were HIV-positive. As the incidence of HIV/AIDS among this professional group would have a negative impact on its labour productivity and affect Ghana's education system, the study was undertaken by GNAT and the Teachers and Education Workers Union of Ghana (TEWUG). It was funded by the **Swedish International Trade Union Development Secretariat.** 

The study's findings revealed that there was a high level of awareness about HIV/AIDS among teachers and other workers in the education

sector. Ninety per cent had heard about HIV from the television, radio, newspapers or other people. As many as 78 per cent of education workers had attended some form of awareness programme, and teachers were more likely to be exposed to awareness training than non-teaching staff. Men working in the education sector were more likely to receive awareness training than women. However, the majority of people known to have died from AIDS were women.

Educational counselling was cited as an essential tool in the campaign against stigmatisation. The research revealed that voluntary counselling and testing (VCT) was still not popular among workers in the education sector. Only 9 per cent of all respondents said they had ever attended VCT, and whereas the majority of the respondents thought it important for everyone to know their HIV status, only 27 per cent reported that they were aware of their own.

The researchers considered that direct contact with people living with HIV/AIDS was an important source of information about the disease and this might inform future policy and practice. Among their target population, the researchers identified and interviewed ten HIV-positive Ghanaian teachers. Of these, seven found out that they were HIV-positive by accident, as they were asked to undergo testing because their spouse or child was ill. None of them received counselling prior to the test. Nine of the ten were now receiving regular counselling. It was also noted that five of them had experienced some form of discrimination due to the stigma attached to the disease.

The study concluded by proposing recommendations for appropriate responses to the needs of teachers living with HIV in Ghana. These included:

- Education for the general public, which should include addressing negative attitudes that led to stigma and discrimination against people who were HIV-positive;
- Financial support, care and acceptance for those affected by HIV/AIDS;
- Education, care and support for the children of those affected by HIV/AIDS.

It was noted that while the government provided some subsidies, considerable sums of money were needed for anti-retroviral drugs (ARVs). Ms Awurasa proposed that a fund or support scheme should be established through the district assemblies of teacher unions for teachers and educational workers living with HIV/AIDS and that they should be provided with decent and affordable housing. Finally, as a way of displaying solidarity with those who were affected by HIV/AIDS, she urged unions to organise their HIV-positive members. Ms Awurasa concluded her presentation by noting that there was a role for the Ghana Education Service in exploring the possibility of providing special retirement packages and free ARVs, and training teachers and counsellors to support those living with HIV/AIDS.

Ms Nare introduced her presentation, entitled 'An Evaluation of the Prevention, Care and Treatment Access for South African Teachers'. She explained that in 2004 an alliance of South African and US non-governmental organisations (NGOs) designed a two-year project to mitigate the impact of HIV/AIDS on the education sector and on South African teachers. The project, Prevention, Care and Treatment Access (PCTA), was designed in response to the findings of a comprehensive study of the impact of HIV/AIDS on educators conducted by the South African Human Science Research Council (HSRC) at the request of the Education Labour Relations Council (ELRC). The study revealed that HIV/AIDS prevalence among educators in all provinces, and from all age and racial groups, was 12 per cent. However, the three provinces with the highest HIV prevalence rates among teachers were Eastern Cape, KwaZulu-Natal and

Mpumalanga. The PCTA project was designed to offer an integrated approach to prevention, care and treatment among teachers through:

- Preventing the transmission of HIV/AIDS
- Promoting the treatment of HIV-positive people through ARVs
- Providing palliative care for those who were HIV-positive.

Ms Nare presented a summary evaluation of the impact of the PCTA project on South African teachers, and reviewed the changes which had occurred in teacher knowledge, attitudes and practice as a consequence of its interventions. The study was initiated by SADTU in collaboration with the Department of Education and other unions, including the National Professional Teachers Union and the Suid Afrikaanse Onderwysers Unie. She advised that the research design was quasi-experimental and looked through pre- and post-assessment at the extent of change brought about by interventions in the schools selected for the study. Schools and educators comprised the intervention/experimental group and for comparative purposes a control group was identified in Free State province. Free State had a similar prevalence of HIV among teachers and its overall demographics were similar to those of the intervention provinces. The intervention period lasted nine months and the key post-intervention research questions were:

- Did teachers in the intervention group access prevention, care and treatment services to a greater extent or differently, compared with teachers in the comparison group?
- Did teachers access VCT from the community care centre?
- Did HIV-positive teachers and their families access anti-retroviral treatment and care?
- Were teachers fully informed about the AIDS pandemic and the impact it had on the school, the community, the union and teachers' families?

- Were teachers motivated to take action to prevent the spread of HIV/AIDS?
- Were teachers empowered to take action when they or their colleagues were the victims of stigmatisation or discrimination?

The assessment probed specifically the extent to which knowledge about HIV/AIDS had increased, whether teachers had been encouraged to access treatment, whether they talked openly and whether there had been changes in teachers' knowledge as a direct result of the intervention. Altogether, 374 data gatherers were deployed in field work and in interviewing 1,723 teachers and educators in 374 schools.

In summarising the findings of the study, Ms Nare noted that 50 per cent of the teachers interviewed in the post-testing phase had attended peer education sessions. Of these, more than 80 per cent had found the information they received satisfactory. The most noticeable impact of the intervention was teachers' and educators' increased knowledge about HIV/AIDS. There was very little evidence of attitudinal change in respect of the stigma associated with the disease. This attitude fostered fears of rejection by family and colleagues, and of job loss, and reluctance to access VCT.

In conclusion, Ms Nare stated that despite the disappointing overall findings, the intervention had created awareness of the union effort and had encouraged teachers to attend education sessions. Clear messages had also been sent from the leadership of teachers' organisations about the importance of voluntary testing and counselling. Despite the availability of free treatment, the teachers did not wish to be seen attending clinics as they were afraid of being identified as victims. The psycho-social support provided by the



Ms Lulame Nare

Department of Education for HIV-positive teachers was far from adequate and there was a fear that the doctors themselves might disclose information about their patients. Finally, Ms Nare proposed that teachers needed to have trust and a sense of privacy and to be able to rely on confidential resources; all three would take time to build.

The recommendations of the study included the creation and sustaining of an enabling environment for individual attitudinal and behavioural change to occur among teachers. The creation of such an environment would require strong support from unions and Department of Education staff. Ms Nare stressed the importance of sending a clear message that teachers would not lose their jobs if they were found to be HIV-positive. This complemented her call for greater availability of anti-retroviral drugs for HIV-affected teachers.

## Session 4: The Impact of HIV/AIDS on Education and the Teaching Profession, II

The session was chaired by Ms Samidha Garg, who introduced Ms Lucy Barimbui, EFAIDS Co-ordinator of the Kenya National Union of Teachers (KNUT), and Dr Paul Miller.

Ms Barimbui presented her research, entitled 'Education for All and the HIV/AIDS Pandemic in Kenya', saying that the first case of HIV/AIDS in Kenya was identified in 1984. Since then, the negative impact of the pandemic had been felt in all sectors — 'in our homes, education offices, schools and colleges'. However, inroads had been made into the epidemic, as the most recent prevalence rate was estimated at 5.1 per cent, a fall from 5.9 per cent in 2005 and a sharp decline from the 14 per cent estimated in 2000. It was estimated that the number of new cases among adults was falling dramatically, but the number of deaths had risen to an estimated 150,000 a year, and 1.3 million adults and 100,000 children were HIV-positive.

Prevalence rates varied across provinces: Nyanza had the highest rate at 13.1 per cent, the rate in Nairobi was 9 per cent, the Coast 6 per cent and North Eastern Province only 1 per cent. One of the major concerns was the number of orphaned children and the increase in child-headed households. Poverty was on the increase, with the loss of family breadwinners and sick employees leading to reduced productivity in the workplace. All this was made worse by the loss of skilled manpower due to sickness and death. The need to replace this human capital had led to a high level of demand for training and additional human resources. There was also a need for assistance with medical costs.

Ms Barimbui said that since December 1999, when the pandemic was first declared a national disaster, the Kenyan Government had taken some measures. By 2003 a national council had been put in place to co-ordinate HIV/AIDS initiatives and in 2005 the President launched the Total War Against AIDS (TOWA)



Dr Paul Miller

programme. A multi-sectoral approach was adopted and the Ministry of Education led the public sector in taking action through resource mobilisation and policy implementation. The teaching profession, which had remained 240,000-strong for the last five years, included an estimated 10,000 teachers who were HIV-positive; 3,000 of these had gone public and participate in the support group 'Teachers with AIDS'. Despite openness on the part of some teachers, many were still uncomfortable about benefiting from VCT. To make matters worse, IMF and World Bank strictures on the public sector wage bill had caused teacher recruitment to remain static for the last five years.

In the Kenyan education system, the impact and effect of HIV/AIDS had a deleterious effect overall on education quality. Ms Barimbui said there were high levels of absenteeism among learners, and those students who did attend school often displayed anxiety, confusion and insecurity. The number of orphans and vulnerable children had risen to around 2 million and the level of enrolment and completion rates among learners had fallen. Ms Barimbui reported that it had proved difficult to cover the school syllabus in many subject areas and there is a perception that high mortality levels exist among teachers. A growing number of families were breaking up as the infected and affected were subject

to stigma and discrimination within their own communities and families. Among teachers specifically, it was estimated that death rates were sometimes as high as six per day. Many teachers appeared ill-prepared to undertake the role of counsellors and they were also obliged to carry the burden of being caregivers and community leaders. Many were frequently obliged to officiate at the funerals of AIDS victims.

Realising that HIV/AIDS was reversing gains which had been made nationally towards the achievement of EFA goals, the Kenyan Project commenced with KNUT's decision to make a positive contribution to the situation created by the HIV/AIDS pandemic. Despite a lack of data and resources, and a low level of awareness about HIV/AIDS among teachers, the 200,000 strong membership of KNUT, with the support of EI, the American Federation of Teachers, UNESCO, USAID, the Ministry of Education and the Kenyan Teaching Service Commission, has embarked on a programme of HIV education. The intention is to build the capacity of the union to help mitigate the results of the HIV/AIDS pandemic. An intensive advocacy programme involving 10,000 teachers has been launched with user-friendly HIV/AIDS workplace programmes. Materials on HIV/AIDS have been published and widely disseminated, including materials which focus on the reduction of stigma and discrimination. Posters, flyers, murals, poems and songs have been distributed among learners. These activities have empowered teachers to become involved in breaking the silence and participating in education about HIV/AIDS. Links with service providers have been created to enable teachers who wish to access VCT to do so.

### Recent reversals in Kenya

Ms Barimbui emphasised that the outcomes of the intervention demonstrated that teachers' unions had a major role to play in responding to HIV/AIDs in the workplace. Recognising that unions have the capacity to influence behaviour change and prove that HIV is everyone's business, the union initiative reached over 400,000 parents. She said, however, that there were insufficient resources

to deal with free primary and free secondary education. The move to universal free primary education has already taken resources away from AIDS programmes. As long as pupilteacher ratios remain in the region of 100:1, and in the absence of adequate statistical data, the implementation of the HIV/AIDS policy would fall by the wayside. The civil unrest in the period December 2007 to March 2008, fuelled by dissatisfaction with the outcome of the Kenyan elections, triggered a major reversal in the advances made through the KNUT programme. Following the election, there were widespread incidents of rape of children and women, and disruption of medical care and access to ARVs. Much-needed medical services disappeared and there was an increase in school drop-out rates in the areas most affected by the conflict. Sadly, Ms Barimbui concluded, there was a likelihood of new cases of HIV/AIDS which will include teachers and there was also evidence of a growing number of cases of cholera and typhoid.

Ms Barimbui closed by recommending that:

- Governments should work closely with education partners in attempting to eradicate the pandemic;
- More resources should be allocated to the fight against HIV/AIDS;
- A higher level of monitoring and evaluation of the pandemic and its effects should be put in place by the Ministry of Education.

The Chair then invited Dr Miller to make a second presentation to the symposium, entitled 'Estimating the Potential Impact of HIV/AIDS on Teacher Supply and Retention in the Caribbean'. Dr Miller said that the presentation drew on the seminal work of Professor Claire Risley of Imperial College, London, who had developed a mathematical model of the dynamics of assessing teacher numbers based on the impact of HIV/AIDS in the absence of anti-retroviral treatment. He argued that in the absence of data on teachers and the HIV/AIDS pandemic in the Caribbean, it was important to assess the connection between HIV/AIDS and education and

distinguish between its qualitative and quantitative effects. He noted that for a significant period responsibility for addressing HIV/AIDS was confined to the health sector. However, the education sector had now recognised that it has a key role to play in efforts to control the disease (Risley and Bundy, 2007). The paradox, he suggested, was made even more apparent as education could help stop the spread of HIV/AIDS, but the disease damaged and had the potential to destroy the system delivering this education.

Data from UNAIDS, UNICEF and USAID suggested that in 2004 there were a total of 1,035,900 HIV/AIDS orphans in the ten Caribbean countries covered. In Haiti, which is not a Commonwealth member, approximately 610,000 children had been orphaned as a result of the pandemic. Projections were for an increase to 1,087,000 in these ten countries by 2010.

Addressing the effect of HIV/ AIDS on the quality of education delivery and supply, Dr Miller proposed that the most crucial effect on the supply of education was the decreased availability of experienced teachers. The impact on teacher productivity manifested itself in absences, loss of energy and motivation (Kelly, 2000). Dr Miller also felt that access to anti—retroviral treatment was a key issue and

was critically important for maintaining the productivity of teachers living with HIV/ AIDS.

Dr Miller quoted from Kelly and Bain (2005), who advised that as a consequence of the pandemic, the quality of education delivery might be diluted by a combination of factors, including the loss of trained and experienced teachers, the reduction in teacher productivity through illness and psychological stress, and the loss of management capacity. Unfortunately, no country in the Caribbean had yet undertaken a comprehensive impact assessment of the effects of HIV/AIDS on the education sector (Risley and Bundy, 2007). These researchers used the Ed—SIDA model to forecast the impact of HIV and AIDS on the supply of teachers in the Caribbean.

Dr Miller said that the focus of his study was a country-by-country analysis of the Caribbean region with the data added together to provide regional projections. He presented projections for the entire Caribbean, the Organisation of Eastern Caribbean States (OECS), Guyana, and Trinidad and Tobago, which illustrated the impact upon individual states. The study relied on the following sources and on the baseline assumption that anti-retroviral treatment would be provided to all teachers who require it up to 2015.

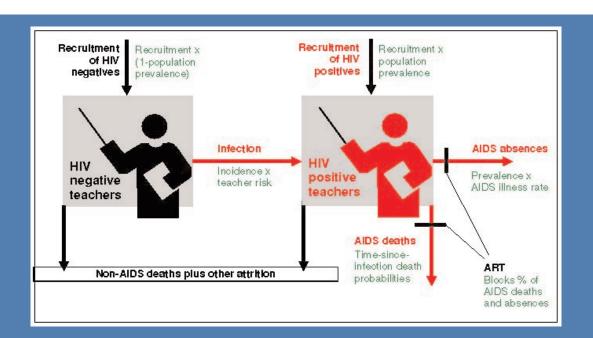


Figure 4: HIV/AIDS and teacher absences and deaths

The following factors and sources of information were taken into account in analysing the findings:

- Country—specific HIV prevalence projections based on antenatal clinic surveillance data and scaled to the 2004 estimates made by UNAIDS or the Caribbean Epidemiology Centre;
- Number of teachers, based on data provided by UNESCO Institute of Statistics (UIS);
- Attrition and recruitment data were assumed to be equal across the region;
- Financial data were obtained from Fitzgerald and Gomez (2003) (anti—retroviral medicine costs); Lewin, 2002 (teacher salary and training costs);
- Country reports on social security at http://www.ssa.gov (funeral costs) and Babb (Jamaican teacher training and salary costs).

Using these data in conjunction with the Risley (Imperial College) mathematical formula, the study yielded a number of results.

Table 5: Estimates of the number of teachers who will be HIV-positive or have died from AIDS-related illnesses by 2015

	Estimated numbers of HIV- positive teachers by 2015	Teacher AIDS deaths to 2015	AIDS deaths in 2015 as a per centage of all deaths
Caribbean	9,300	11,800	13%
OECS	100	100	5%
Guyana	200	200	13%
Trinidad	300	300	9%

**Note:** Data rounded to nearest 100, assuming a medianprevalence scenario and anti-retroviral treatment given to all teachers needing it (baseline attrition rate from Grenada)

Indications are that teacher turnover in Caribbean schools was fairly low compared to the UNESCO baseline of 3 per cent, which results in a significant AIDS loss in terms of overall attrition. Therefore, the loss of some 12,000 teachers in the Caribbean by 2015

represents a significant impact. HIV/AIDS would have a financial impact on the supply of education in the region.

In conclusion, Dr Miller said that the projections suggested that the number of HIV-positive teachers and teacher deaths from AIDS-related illnesses were likely to increase among Caribbean teachers during the next few years. The life expectancy of HIV-positive teachers would increase, however, if all teachers were given anti—retroviral treatment. Deaths would continue to increase, as teachers who became infected during the initial peak in incidence would die despite treatment. Countries with higher HIV prevalence and larger populations would lose more teachers. Smaller islands might be disproportionately affected by small shocks to the education system.

Dr Miller explained the special challenges faced by small states in educational development, including human resource difficulties in specialist areas resulting in the need for 'multifunctionalism'. He emphasised that even with the best data, the future of the epidemic was difficult to predict, especially at country level (Risley and Bundy, 2007). It should be recognised that the results presented were an indicative analysis based on limited data.

In summary, Dr Miller stressed that on the evidence of this preliminary data, HIV/AIDS would have a significant impact on the supply of education in the Caribbean. While country-specific analyses were needed to allow for disparities between countries, multi-sectoral strategies should be strengthened to support:

- Prevention of HIV transmission;
- Care and support for those who were infected or affected (including provision of anti-retroviral treatment);
- Managing systemic and institutional impact.

He concluded that whereas at present the education sector's response to HIV/AIDS had concentrated, appropriately, on HIV prevention, it was time to make a comprehensive impact assessment in order to mitigate the negative effects on education delivery in the future.

### Session 5: Panel Discussion

# From research findings to policy development: strategies for using research to improve education policies and programmes

The Chair of the panel discussion, Mr Dennis Sinyolo, introduced the panellists, Professor Michael Kelly, Ms Aida Joaquim Munhequete, teacher trainer from the National Teachers Organisation of Mozambique, Ms Helena Awurasa and Mr Richard Bourne. The Chair stressed the importance of the topic, stating that while the generation of research data was all very well, its purpose was to improve policy formulation and implementation. There were many instances in which the best research had been allowed to gather dust and agreed policies had not been implemented. Panellists were invited to give their views on ways in which research could be used to improve strategies for the development of education policy and programme implementation guided by those policies.

Ms Awurasa opened the discussion by addressing the need to accelerate the rate of education policy change and the role of teachers' trade unions in that process. Teachers' unions, she felt, needed to develop policies based on the requests of their members and to effect change in policies such as pupil-teacher ratios, as reduction in class size was one way of improving quality in education. The use of research data as a basis for advocacy by teachers' unions was another effective method. She said that advocacy that was based on sound data and research would obtain a more sympathetic response from stakeholders. She gave the example of the Kenya National Union of Teachers, which had used such a strategy to mobilise support for collective bargaining for teachers. She indicated that she was committed to carrying out a similar initiative in her own country, Ghana.

Professor Kelly proposed that in using research information to influence policy development, it should be appreciated that all stakeholders might wish to improve the education system for the betterment of the country. He considered that policy submissions should be 'FAD' — feasible, affordable and desirable. Research outputs should be well presented and easily digestible, as ministries of education had neither the time nor desire to address lengthy treatises of data and tables. However, a great deal of goodwill, trust and confidence must exist between the stakeholders, whether they were researchers or ministry of education officials.

Professor Kelly said that the involvement of ministries of education in the evolution of the policy meant that there must be a culture of partnership within ministries that was conducive to stakeholder participation in policy formulation. The planning unit in a ministry must be prepared to listen, and researchers, also, must be prepared to listen to the planning unit. 'We must not forget', he stressed, 'the importance of remembering that we are dealing with human beings'. Referring to Ms Awurasa's point on advocacy, he acknowledged its importance and stressed the value of presenting research data in a striking manner that had visual impact. The researchers must have the courage of their convictions, arising from their research, and be convinced that their findings would lead to change. It was also important to consult with ministries about the research findings prior to final presentation.

Ms Munhequete noted that she was a representative both of the Ministry and the Mozambique Teachers' Union. She said that she herself — as a ministry official and a teachers' union member — was an example of the partnership that was needed between

ministries and teachers' organisations. She proposed that research should be looked at in a more practical way so that its findings could be implemented. She identified critical areas where data was needed to improve education policy, including:

- Teacher training: This was sometimes not sufficiently broad — for example, in the training of teachers the materials and manuals were sometimes confined to the need and importance of HIV/AIDS education and did not go beyond this to deal with the wider social implications.
- In-service teacher training: The absence of in-service training could mean that teachers were not up-to-date with current developments in education practice. Some teachers needed a 'refresher mechanism'.
- Incentives: Teachers needed incentives such as salaries and food supplements.

She concluded by stressing the importance of partnerships between ministries, teachers' organisations and employers.

Mr Bourne argued that there was often a 'disconnect' between research and policy. He alluded to the research which informed the decision to develop the *Commonwealth Teacher Recruitment Protocol*. The research that influenced the decision to formulate the CTRP was generated by four commissioned studies. This was an example and model of how research and policy can influence each other.

He stressed that there needed to be a coalition between researchers and policy-makers. There were, of course, various players in the process, such as the media and the Ministry. A former British prime minister, Margaret Thatcher, had told him that a humble civil servant might have a week in which to study a document. However, by the time the document reached a minister, the minister might have only 30 minutes to reach a decision.

He noted that more than 50 governments were involved in the Commonwealth. He said that he would like to see the issues raised in the report of this symposium considered at

17CCEM in Malaysia in June 2009. The symposium had already flagged up the issues of domestic violence against women, child abuse, rape, incest and the impact of HIV/AIDS on education. He strongly felt that if these issues were put before the ministerial conference, they would be of interest to many of the ministers and officials present.

Inviting contributions from the floor, the Chair summarised the presentations by saying that all panellists agreed that the presentation of research findings must be:

- Simple and well presented in a form that is user friendly;
- Clear and concise, as policy-makers do not have the time to read a great deal;
- Available to the media;
- Directed at involving as many of the stakeholders as possible, such as teachers.

Discussion ensued in relation to the use of research done by the ministries themselves to drive the formulation of certain policies. The point was emphasised that researchers must ensure that they provide an honest and accurate picture and that thereafter the policy decisions should be left in the hands of ministries. Concerns were also expressed about the lack of implementation of policies. There have been a large number of agreements that have not been implemented. Mr Bourne spoke about the action plans that were often arrived at in Commonwealth meetings and encountered difficulties or slowness in their implementation. There was also discussion about the challenges of policy implementation when government ministers—and Commonwealth leaders—were replaced. This presents challenges of continuity.

Professor Kelly cautioned that policy-makers and the gate-keepers of policies were not always at top leadership level. He concluded that it was as important to persuade junior civil servants of the need for policy implementation so as to persuade senior officials at the highest levels of government and civil society.

### Summary, Conclusions and Recommendations

In facilitating the final session, Mr Richard Bourne summarised the main findings and outcomes of the meeting.

He said that HIV/AIDS was a particular issue for the Commonwealth, as explained in Professor Kelly's keynote address. On the first day of the symposium, participants heard presentations that explored research on teacher mobility, recruitment, migration and retention. They considered issues arising from case studies involving teachers recruited within the Commonwealth and examined the cases of six Anglophone African Commonwealth countries. The second day focused on the impact of HIV/AIDS on education and the teaching profession; researchers from Ghana, Kenya, South Africa and the Caribbean shared findings on the extent to which HIV/AIDS has reversed progress towards the achievement of the goal of Education for All.

Mr Bourne then made a number of suggestions for the future:

- The results of the symposium should be presented in a report to ministers of education at the 17th Conference of Commonwealth Education Ministers. The proposal should be that a minister, possibly the Minister of Education of Mozambique, tables the report at 17CCEM.
- Education International might wish to consider its own role in carrying forward the outcomes of the symposium through the forthcoming CCEM and the Teachers' Forum to be held in mid-June 2009.

 Singapore was identified as a possible location for the fourth research symposium; Mr Bourne proposed teacher retention and induction as a possible theme for this meeting.<sup>5</sup>

Other participants mentioned the value of the research symposia that the Commonwealth had organised over the last three years. The idea was to continue the series of symposia so that issues such as gender and its impact on teacher migration could be explored in greater depth. Suggestions about the way forward included a proposal for an assessment of the impact of HIV/AIDS among teachers in the Caribbean, as this was one of the five key working areas of El's EFAIDS programme. El advised that its regional office in the Caribbean would be carrying out research among teachers in the region.

Commonwealth Secretariat and EI representatives then brought the session to a close by expressing gratitude to the Ministry of Education and Culture of Mozambique, the Mozambique National Union of Teachers, Education International, the Commonwealth Teachers' Group, and all the Chairs and researchers who had contributed so fully to the content and success of the symposium.

On the third and final day of the symposium delegates made field visits to the Matola Teacher Training Institution and a local primary school. The visits were followed by a press conference at the Pestana Rovuma Hotel to which local media were invited.

Within a week of the conclusion of the third Commonwealth Teacher Research Symposium, in response to a press item about the event circulated in the Commonwealth news media, an offer was received from the National Education Association, one of the largest teachers' unions in the USA, to host the fourth symposium in Washington, DC in 2009.

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## **Appendix 1**

### Gender, HIV/AIDS and the Status of Teachers

#### **Keynote Address by Professor Michael Kelly**

## HIV and AIDS in the Commonwealth

Since a symposium convened by the Commonwealth Secretariat in collaboration with Education International is the occasion for this paper, it seems appropriate to begin by outlining the extent of HIV and AIDS in Commonwealth countries.

The Commonwealth is the world's most seriously infected global grouping of countries Although it contains less than one-third of the world population, it accounted, at the beginning of 2006, for almost two-thirds of global HIV infections. On the basis of data for individual Commonwealth countries appearing in the 2006 Report on the Global AIDS Epidemic,<sup>6</sup> the HIV infection rate across Commonwealth countries is approximately 1.2 per cent, compared with 0.6 per cent globally. This means that 12 out of every 1,000 people in Commonwealth countries are HIV infected.

Slightly more than half of those who are infected are women. Female infection rates, however, are much higher in sub-Saharan Africa, where 59 per cent of infected adults are women—for every 10 infected adult men, there are 14 infected adult women. As Figure 1 shows, the adverse HIV situation of women in Africa developed not many years after the onset of the epidemic and is steadily becoming more pronounced.

This has implications for the teaching profession and the delivery of educational services, since a high percentage of teachers, especially those in pre-schools and primary schools, are female. There is a potential loss of teachers in terms of sickness and deaths.

There are also constraints on the freedom of educational managers to post women teachers to remote rural schools (where their services may be very badly needed) because of the possible need of infected teachers to be stationed fairly close to clinics where they can access the monitoring, treatment and drugs that their condition may require. The situation also has implications for teachers' ability to be professionally productive. As will be seen below, this can be adversely affected by HIV infection, at least until such time as the infected teacher has succeeded in coming to terms with her or his sero-positive status.

Another feature of the AIDS epidemic that impinges heavily on Commonwealth countries is the legacy of orphans that it leaves in its wake. Three-quarters of the 12 million orphans in Africa who have lost one or both parents to AIDS live in Commonwealth countries south of the Sahara. This too has significant implications for educational provision within those countries and for teachers in their schools. Orphan ability to attend school varies from country to country and according to whether the child is an orphan because of the death of the mother, or of the father, or of both parents. In very broad terms, however, the school participation of orphans tends to be less than that of nonorphans. But the issue goes beyond access to and enrolment in school. Learning to cope with personal orphan status, full integration into the school community, ability to cope with the small cruelties that children can inflict on one another, achieving a sense of security and stability, managing their personal grief and loss, receiving the support, encouragement and love that would have come from the departed parent — these and

others are challenges that orphaned children must face in school. Many could not confront these challenges without the help and support of teachers, especially female teachers. In a sense that was not widely applicable before the AIDS era, many teachers are now serving in loco parentis, since they find themselves acting as surrogate parents for children who are reaching out for the stability, understanding and love of a concerned and caring adult. They also find themselves having to provide psycho-social support and act as counsellors, roles for which they had not been prepared.

# Gender and HIV

HIV and AIDS affect women in different ways than men. On physiological and health grounds women are at higher risk of infection. These physiological and health factors make HIV transmission from male to female seven times more likely than transmission from female to male. On social and economic grounds women are also more vulnerable to infection. Further, when AIDS is present women are more extensively affected. But although AIDS has a woman's face, in general it is women who are leading an effective response.

Gender inequity and inequality in the areas of sexual expectations and behaviour compound this biological vulnerability of women. The stereotyped and socially constructed images of masculinity that are promoted in most cultures portray a picture of the controlling male. The man is seen as the main initiator of sexual activity and the dominant partner in most sexual interactions. Integral to this stereotype are the widespread beliefs that a man 'needs' sexual activity in order to establish his identity and that to exert sexual and physical domination over women defines what it means to be a man.

On the other hand, stereotyped femininity portrays women as submissive, docile, and

compliant. The interest of girls and women in sexual activity is often seen as being motivated by three factors, operating singly or in combination: images of love and friendship that carry with them the imperative of maintaining a satisfactory relationship; the prospect of childbearing; and acquiring social status, money, material resources and important intangible benefits.<sup>7</sup>

These concepts of masculinity and femininity lead to imbalances in decision-making power, with women almost invariably being in a subordinate role and submissive to men. In practice this means that women are weakly placed to determine the circumstances of their sexual lives. They cannot control when, with whom, and under what conditions they have sex, and may often be forced to have unwanted sex.

The stereotyped concepts of masculinity and femininity also lead to double standards governing the sexual behaviour of women and men in both traditional and modern societies. Men are expected to be knowledgeable and experienced in sexual matters, whereas women are expected to be somewhat naive—if they show knowledge or interest in sexual areas they may be regarded as immoral or 'cheap'. Promiscuity among men is more readily condoned than among women. As a result, boys and men tend to have more sexual partners than do girls and women.

All of these practices, and the attitudes that validate them, increase the vulnerability to HIV infection of both men and women, but because of their subordinate status the risk for women is greater.

The vulnerability of women is further accentuated by harmful social practices, some quite widespread, others occurring in more restricted settings. Widespread practices include age-mixing, where younger women partner with older and more sexually

<sup>7</sup> Kempadoo, K. and Dunn, L. L., 'Factors that shape the initiation of early sexual activity among adolescent boys and girls', in *Meeting Adolescent Development and Participation Rights: The Findings of Five Research Studies on Adolescents in Jamaica, Kingston*: UNICEF and UNFPA, 2002, p. 170.

experienced men, and multiple sexual relationships in which an individual maintains a number of sexual partnerships, either successively or at the same time. Age-mixing increases in a number of ways the risk that the girl will become HIV infected. There is a possibility that the older male partner will already be sexually experienced and hence may already have contracted HIV. The girl has almost no power within the relationship to insist on safer sexual behaviour, while there is always potential for violence, especially if the girl attempts to end the affair. It seems likely that this form of relationship is responsible for much of the HIV transmission in the 15-24 age group. The girl becomes infected through her older and more experienced sexual partner. But she also maintains relationships with her male age-mates and hence can pass infection on to them.

Women's vulnerability to HIV infection may also be increased in societies that have preserved long-standing traditional practices, some of which are in flagrant violation of human rights. These include early marriages for girls, before they have reached physiological maturity and when they should still be attending school; ritual cleansing which requires that a widow have intercourse with a member of her late husband's family; dry sex where herbs are used to dry out and tighten the vagina (in order to increase male pleasure, but at the risk of vaginal abrasions that facilitate the entry of HIV and other viruses); and female genital mutilation (the partial or total removal of the external female genitalia) which causes chronic genital injury, easy tearing and possible ulceration, thereby heightening HIV risk.<sup>8</sup>

In addition to all this there are the many impediments that girls face in accessing education, staying in school and performing well while there. These range from the insufficiency of school places and low levels

of educational quality, through the costs that prohibit poor families from ensuring the school education of girls, to the ease with which girls are taken from school in order to provide household labour. There is now strong evidence that school education can reduce girls' vulnerability to HIV in a variety of ways, principally by helping them to build their selfesteem and capacity to act on HIV prevention messages, influencing the level of power within sexual relations, and leading to better economic prospects, which in turn lead to lifestyle changes that can influence HIV vulnerability. But persisting gender inequalities in education continue to exclude a disproportionate number of girls from these benefits and thereby heighten their vulnerability to potential HIV infection.

# Gender, teachers and HIV

Teachers grow up, live and work in societies where these norms, attitudes and practices are accepted. They are integrated into their lives through the normal processes of socialisation. Hence they become accepted principles that guide both female and male teachers, in their personal behaviour and interactions and in the expectations they form for their pupils, colleagues and others in their communities. As with others in society, teachers may find these norms problematic and strive towards a more lofty value system. But until substantial change occurs within the outlook of society itself, these remain the norms that exercise a strong influence on the attitudes, practices and even values of teachers.

Recognising, but not condoning, the deep personal and peer pressures to which these norms may give rise, makes it necessary to ask about the extent to which they contribute to HIV transmission among teachers, reported (though not always proven) cases of sexual abuse in schools, and the global ignominy of gender-based violence (GBV).

<sup>8</sup> The World Health Organisation estimates that between 100 and 140 million women and girls have undergone female genital mutilation and that about two million more are added to that number each year.

<sup>9</sup> Hargreaves, J. and Boler, T. *Girl power: the impact of girls' education on HIV and sexual behaviour.* London: ActionAid International, 2006, p. 4.

Like an intense spotlight, the AIDS epidemic has helped to focus world attention on various problem areas within society. Among these are the extent of gender-based violence and the sexual abuse of children. Violence against women is the most pervasive of all human rights violations – up to half of all adult women have experienced violence at the hands of their intimate partners, while one in five women worldwide will survive rape or attempted rape. The shocking situation for children is that globally 20 per cent of girls and 10 per cent of boys experience sexual abuse as a child. For girls the situation is especially grave since it is estimated that almost half of all sexual assaults in the world are against girls aged 15 or younger. Moreover, the sexual abuse of children frequently takes place in the home, school, or community, with the perpetrators often being individuals the children know and trust.

Unhappily, teachers may be among these child abusers. Although the documentation is not very precise, as many as 50 per cent of schoolchildren in some countries report having been physically or sexually assaulted while at school. Where it occurs, pupil abuse tends to be inflicted mostly by male teachers on girls, though cases have been reported of boys being abused by male as well as female teachers. One commonly alleged reason for sexual interactions between educators and learners is the willingness of learners to trade sexual favours for good grades, access to the contents of examination papers, or entrée to a higher educational level. This has led to what some countries now refer to as 'sexually transmitted grades' or STGs.

Individual teachers, school heads, education ministries, teacher unions and communities have to maintain unfailing diligence to ensure that proscribed sexual interactions never occur in a school setting. Apart from the violations of trust that these entail, they constitute grave human rights abuses and in most countries are serious criminal offences. Pedagogically, they create a great divide between the values that educators seek to communicate and those

that they practise, while in relation to HIV they open a ready channel for the transmission of the virus from a possibly infected older educator to a young learner.

Without minimising in any way the gravity of sexual activities between teachers and students, one must ask whether the stance of society is firm enough and whether the sanctions fit the crime. Fearing that it will lose the services of a teacher, a community may persuade the family of a violated child to take no action. Moreover, the circumstances of sexual abuse at school may be such that in the absence of anything more than allegations, education ministries may not be able to take action. And in an environment that reflects the truth of the 17th century legal adage, 'in a rape case, it is the victim and not the defendant who is on trial', a family may not wish to pursue investigations that might bring other family matters out into the open.

# General considerations on HIV/AIDS and teachers

The possibility that teachers may be HIV infected and the potential consequences of this for education systems in terms of teacher attrition and replacement needs have received considerable attention in the literature. As has happened with the Millennium Development Goals, gender-based equality, and the education of orphans, the discussion frequently revolves around the numbers. The importance of numbers cannot be doubted, but the quantitative aspects do not tell the whole story and often they do not tell the most important parts of the story. In many cases, qualitative aspects may be considerably more significant. In a world that dedicates massive human and financial resources to measurement, Einstein's maxim is very relevant: 'What can be counted does not necessarily count, what counts cannot necessarily be counted'. In the circumstances of HIV/AIDS and teachers, what really counts may be teacher status in relation to the epidemic, the multiple demands on female teachers, protecting educational quality, the

sexual norms and expectations in society (considered above) and the school culture.

A second consideration is the importance of enabling teachers arrive at authentic learning and understanding of the epidemic. Many programmes stop short at superficial, factual knowledge. Important as this is, it needs to be complemented by authentic learning that leads to personal knowing, changes in attitudes, and the adoption of values. There is considerable need to develop teacher capacity to get in touch with what HIV/AIDS means in their lives, and to examine and deal with the challenges that being HIV infected or affected presents for them as persons, living in this community, working in this school, and with these terms and conditions of service. Developing this capacity would lead to more authentic understanding of the epidemic, something that would help teachers take better charge of their own lives in a world with AIDS. It would also equip them better to guide the young people entrusted to them in an ethical human response to the epidemic. Moreover, teachers who have reflected critically on the epidemic in ways that engage the whole person may be better able to communicate effectively on HIV and AIDS issues with learners.

A third consideration is the image or role of teachers in a community. Parents and others usually see teachers as responsible for fostering much of the overall development of young people so that they might achieve personal fulfilment and become significant members of society. Because of this, teachers tend to hold a position of respect and special status in society, even though they may not be recompensed proportionately. This may lead to their feeling more compromised than others if they are directly affected by HIV, either in their own persons or in their families. Likewise, stigma and misunderstandings continue to be so insidious that parents may raise questions if they learn that an HIV positive teacher is teaching their children.

# HIV/AIDS and various teacher roles

The majority of teachers live out their lives in a variety of different roles. They have a personal life, as family members and frequently as heads of households. They have a professional life within the school and classroom. They are employees of an education ministry or of a school's governing board. They are community members. HIV and AIDS say different things to teachers in each of these roles.

At the individual level, a teacher who is personally HIV infected, or in whose immediate family there is HIV, experiences extensive psychological and emotional turmoil. Although antiretroviral drugs should prevent the infection from running its course to potentially lethal AIDS conditions, there are deep personal concerns both about the infection itself and accessing all that the treatment requires. Stigma ranks high among these concerns, not only the stigma coming from others that reaches deep into the hearts of those affected, destroying their spirit more effectively than the HIV virus destroys their bodies, but also the self-stigma that relentlessly eats away at their self-esteem in intense disabling feelings of anguish, shame, dejection, self-doubt, guilt, self-blame and inferiority.

Like others in similar circumstances, the ability to access ARVs will be of concern to a teacher. Will the drugs be available? What costs will they entail? How can a person stationed in a school in a remote rural area access these every time they are required? How much will travel to the nearest clinic cost? Will the school authorities always be accommodating in giving time off for clinic attendance? What will teaching colleagues at the school think when they are asked to cover for absences of a day or more every month? How possible will it be to ensure the regular nutritious diet that should accompany ARV treatment?

Worrying about these and similar issues goes beyond the personal level. The worries can lead to various degrees of 'mental absenteeism' and lack of concentration on the teaching duties in hand. As an HIV infected teacher has put it, 'teaching is a psychological job, I need to have my mind settled'.<sup>10</sup>

The infection of somebody in the household affects teachers in their families in much the same way as it affects others in the settings of their own families. It entails care, financial outlay and deep anxieties. Attending to the person whose HIV has progressed to AIDS may be a labour of great love, but it is also very demanding on time and on the caregiver's psychological reserves. There are further demands on time, as also on financial resources, in the special shopping that AIDScare in the home requires and in ensuring regular contact with the clinic for the monitoring of the patient's condition, the treatment of opportunistic infections and the dispensing of antiretroviral drugs.

As with childcare, much of this health care in the home is provided by women, the same women who form the majority of primary school teachers and, in some countries, of secondary school teachers. Female teachers frequently find themselves pulled between three competing roles, that of their professional work area, that of managing a household, and that of attending to sick persons who may require almost round-theclock care. Very seldom does one hear of flexible arrangements that would enable such teachers handle more effectively and humanely their responsibilities in these three areas.

In relation to what teachers do as teachers, AIDS can affect their professional role within the school or classroom in a variety of ways:

 They may have to take on additional responsibilities to cover for a sick or absent colleague.

- They may be required to teach in areas where they do not feel competent because the teacher who knows the subject is sick or has died.
- They are increasingly being asked to integrate HIV and AIDS perspectives into their classroom work, but many do not feel competent or able to do so.
- The teaching of life-skills has become integral to the curriculum for education in an AIDS-infected society, but many teachers are not conversant with the methods or approaches needed for effective teaching in this area.
- Teachers face new demands because of the behavioural, emotional and psychological problems that infected and affected learners (especially orphans) bring into the classroom.
- Many teachers find that in addition to their teaching work they are also expected to provide counselling services for affected or infected learners.
- Teachers find that an increasing amount of their time is taken up by workshops and in-service training activities designed to make them knowledgeable and competent in HIV-related areas.

Workplace implications of HIV and AIDS affect teachers in their capacity as employees. Many are reluctant to reveal their HIV status within the school setting because they fear that confidentiality will not be maintained. Some experience intense personal pressure to perform, partly to counteract their debilitating self-stigma, partly to protect their employment by showing that they are productive. Frequent and mostly unavoidable absenteeism causes worry about what is being entered on one's personal record, as well as concerns about the way this is affecting the learning of pupils for whom one is responsible. There are also workplace issues such as those relating to the prohibition of discrimination and stigma, the

<sup>10</sup> Supporting HIV positive teachers in East and Southern Africa. UNESCO and EI-EFAIDS, Report of Technical Consultation, Nairobi, Kenya, 30 November—1 December 2006, p. 9.

prevention of risks, safety in the school environment, and the absence of violence and abuse.

# HIV prevalence and AIDS mortality among teachers

Considerations of HIV/AIDS and the status of teachers almost inevitably force one to ask whether the rate of HIV infection among teachers is the same as that in the general population, or is it higher or lower. It is also necessary to ask about the levels of AIDSrelated teacher mortality. Conventional wisdom held that early in the history of the epidemic, the three Ms — men, mobility and money — fuelled HIV infection. Relative to others in the community, teachers had money and were more mobile. In some countries the need for teachers to travel each month to a district centre to collect their salaries accentuated the risk arising from the money and mobility combination. Teaching practice arrangements that do not address trainee teachers' need for suitable accommodation may also place individuals in a position where the money and mobility combination might contribute to an increase in risk-laden casual sex.

But even though teachers may have more money and greater mobility than others, they remain members of their communities, living according to the same cultural and behavioural norms. There are no a prior grounds for believing that infection rates among them should be higher than within these communities. Indeed, the opposite may be the case. The fact that in relation to the general population, teachers tend to be better educated, better nourished, and have better levels of information about the epidemic, might actually predispose them to less risk.

Perhaps the best evidence on this whole question comes from South Africa. A survey

conducted in 2004 found that 12.7 per cent of over 17,000 teachers who gave specimens for testing were HIV positive. 11 This was similar to the prevalence rate among the general population. But unlike the situation in the general population, the HIV prevalence rates among men and women educators were the same. It would be valuable if national level HIV surveys in other countries allowed for the disaggregation of information on teachers so that there could be better understanding on whether or not teachers constitute a special category that is at high risk of HIV infection.

Additionally, it seems that teacher mortality due to AIDS does not differ much from AIDS mortality rates for similar occupational groups. Moreover, mortality rates for teachers do not seem to be unduly high. In some countries, male teachers have a higher mortality rate than female teachers, even though there is more HIV among female teachers. In Zambia, for instance, 342 male teachers, or 0.88 per cent of the male total, died in 2006, compared with 251 or 0.75 per cent of the female total. In a number of high prevalence countries, teacher mortality due to AIDS is decreasing, largely due to the increasing availability of ARVs<sup>12</sup>. National and global moves to universal access (to HIV prevention, care, support and treatment) are likely to see even further decreases.

Thus, while the epidemic continues to have major impacts within the education sector, it is not causing as much turbulence as had earlier been anticipated in terms of morbidity and mortality. There is need to capitalise on this positive situation so that teachers and the system can better institutionalise the epidemic within the sector and respond to it in a way that will enhance education's significant potential to protect its own personnel and its millions of young clients against HIV infection and its numerous negative outcomes.

<sup>11</sup> Human Sciences Research Council (HSRC) and Medical Research Council (MRC) of South Africa, Fact Sheet No. 6, *HIV Prevalence among South African Educators in Public Schools*, 2005.

<sup>&#</sup>x27;Anti-retroviral drugs are driving down AIDS mortality in Sub-Saharan Africa', Paul Bennell, Knowledge and Skills for Development, Brighton, UK, December 2006.

# HIV/AIDS in the curriculum

Education is often considered as providing a 'social vaccine' against HIV infection. 'It is often said that people who wear a tie do not get cholera. In the case of HIV/AIDS, education is likely to determine a person's vulnerability to HIV infection.'<sup>13</sup> Various studies continue to support this view that HIV prevalence will be lower among those who are attending school or have higher levels of educational attainment.<sup>14</sup> This positive benefit from education does not occur in a vacuum but is largely the outcome of what teachers can accomplish in the classroom.

In many school systems, however, teachers feel that they are not properly equipped to contribute as they could in the area of HIV and AIDS. Many complain that they have had little training in the areas of HIV/AIDS and sexual and reproductive health, at either preservice or in-service level. Surveys have also drawn attention to many of the shortcomings in teacher knowledge on the epidemic. Education International has summed up the situation in terms of reports received from teacher unions in many countries:

[Teachers] often feel hopelessly incompetent when confronted with questions posed on HIV and AIDS. Teachers tell their union leaders about the lack of training and the poor supply of materials they are faced with. In other instances, education authorities are providing teachers with books but not the training they need to be able to diffuse the knowledge contained in them. They often face resistance to teaching on HIV and AIDS related issues from parents and even the education authorities themselves.<sup>15</sup>

Teachers also need help in teaching HIV/AIDS matters competently and with assurance in

the circumstances of large co-educational classes where the pupils may be of widely differing ages. Because of the subject matter they are dealing with, women and men teachers will face different problems, but neither may get the help they feel they need. In many situations all that is being provided is rather superficial teaching of facts, with little consideration of key sexuality and relationship issues. As with almost every other community member, many teachers feel they can offer little more than partial information, some facts, considerable embarrassment, and sometimes almost total silence.

A major concern of teachers is their fear that dealing with sensitive topics in sexuality may expose them to community criticism that they are teaching promiscuity and opening the door to the very practices they are seeking to discourage. The task of teachers would be greatly facilitated if they themselves, communities and the cultural and religious leaders who are the gatekeepers of society became more aware of the strong evidence from developing and developed countries alike that school-based sex and HIV education interventions do not lead to an increase in sexual activity. Instead they contribute to delay in participants' reported sexual activity, reduction in the number of sexual partners, decrease in their frequency of sexual activity and increase in their use of condoms. 16

# **Conclusion**

It should be clear that gender, HIV/AIDS and the status of teachers involve interactions at many different levels. Measures directed at one member of this triptych very quickly find themselves dealing with the other two. Many specific interventions can be proposed for responding to some of the challenges that present themselves. But in line with the

<sup>13 &#</sup>x27;The "education vaccine" against HIV/AIDS', J. Vandemoortele and E. Delmonica, Contemporary Issues in Comparative Education, 3 (1), December 2000.

J. Hargreaves et al., (2008). 'The association between school attendance, HIV infection and sexual behaviour among young people in South Africa', *Journal of Epidemiology and Community Health*, 62: 113—119.

<sup>15</sup> Training for Life: El Report Teacher Training on HIV/AIDS, July 2007, p. 4.

<sup>16</sup> Preventing HIV/AIDS in Young People. A Systematic Review of the Evidence from Developing Countries. Eds. David A. Ross, Bruce Dick and Jane Ferguson. UNAIDS Inter-agency Task Team on Young People. Geneva: WHO Technical Report No. 938, 2006.

greater stress that this paper puts on qualitative perspectives it is suggested that one of the greatest needs is for the establishment within schools and every kind of educational institution of a positive lifeaffirming institutional culture and organisational milieu.

Such a culture should be strongly rights-based, affirming gender equality in principle and in practice. It should show zero tolerance for all forms of violence and for every manifestation of stigma or discrimination. It should encourage the development of life-affirming attitudes and values. Most importantly, it should seek to transform understandings of what it is to be a woman and what it is to be a man. In this it should involve male teachers and pupils in a way that will expand their gender understanding beyond the limits of the male sexual dominance model that is so widespread and that wreaks so much harm. In this way it would address one of the major drivers of the AIDS epidemic and a feature of society that is demeaning to women.

This will not be easy. In particular, it will not be easy for teachers either to grasp or communicate such understandings. But even small beginnings will be of great worth. The essential point is that teachers, whether female or male, should recognise that they

have a special role in the formation of values and that these values persist with young people long after they have left school. In this regard, the school culture is the great ally of teachers. A school that runs on the principles of the full equality of every man and woman, of every infected and non-infected person, and of the dignity of every individual, will help to build up in members of its community the recognition that being human is what counts. And that is the first step in transforming the negative gender norms that debase women and maintain HIV infection.

In many respects, Jonathan Mann, Director of the World Health Organization's Special Programme on AIDS (the predecessor of UNAIDS) summed up the issue when he said, 'The central [AIDS] issue isn't technological or biological: it is the inferior status or role of women. ... When women's human rights and dignity are not respected, society creates and favours their vulnerability to AIDS.'

Ensuring that women are no longer relegated to an inferior status or role and that their human rights and dignity are at all times respected is the real challenge that consideration of HIV/AIDS, gender and the status of teachers places before every educator and education system.

# **Appendix 2**

Teacher Supply, Recruitment and Retention in Six Sub-Saharan Anglophone Countries: Report of a Study Conducted by Education International in The Gambia, Kenya, Lesotho, Tanzania, Uganda and Zambia

## **Dennis Sinyolo**

# Introduction

The achievement of the Education for All (EFA) targets and education-related Millennium Development Goals (MDGs)<sup>17</sup> depends, to a very large extent, on the availability of properly trained and qualified teachers. The educational quality imperative cannot be met without quality teachers-these are professionally trained teachers who understand both subject matter and teaching pedagogy.

There is overwhelming evidence that qualified teachers contribute to quality teaching and learning. The World Education Forum (2000) recognised the crucial role of trained teachers in the achievement of the EFA targets. One of the strategies adopted by the Forum to achieve the EFA goals, as given in The Dakar Framework (2000), was to 'identify, train and retain good teachers ...'18 In their joint publication on teachers, UNESCO and the OECD<sup>19</sup> (2001), argue that 'a better trained teaching force is an important factor in educational quality'. <sup>20</sup> The two organisations further support the importance of professionally trained and qualified teachers by contending that 'teachers' subject matter expertise must be complemented by pedagogical competence'.21 Even the World Bank Operations Evaluation Department (OED) aptly acknowledges, in its 2004 Background Paper for the Evaluation of the Bank's Support to Primary Education, 'Many studies find that teacher training is important.'22 The paper correctly observes that 'better trained teachers are more effective in terms of cognitive achievement'.<sup>23</sup> Furthermore, many countries have invested tremendously in teacher education, both in pre-service and in-service training because they realise the enormous benefits of having professionally trained and qualified teachers. The above evidence clearly indicates that qualified teachers do matter. That is why proponents of the notion that anyone can teach would not allow their own children to be taught by unqualified teachers.

Unfortunately, some countries have turned a blind eye to the importance of qualified teachers and decided to employ unqualified, volunteer, contract or para-teachers. These teachers generally have very minimal or no teacher training at all, and are normally hired locally and paid by the community. The employment of unqualified, volunteer, contract or para-teachers is sometimes prescribed or done on the advice of international financial institutions such as the International Monetary Fund (IMF) and the World Bank as a way of controlling or reducing education budgets and government expenditure.

<sup>17</sup> Boxes 1 and 2 show the EFA and education-related MDGs.

<sup>18</sup> The Dakar Framework for Action, Dakar, 2000, p. 20.

<sup>19</sup> Organisation for Economic Co-operation and Development.

<sup>20</sup> Teachers for Tomorrow's Schools: Analysis of the World Education Indicators, 2001, p. 7.

<sup>21</sup> Teachers for Tomorrow's Schools: Analysis of the World Education Indicators, 2001, p. 10.

<sup>22</sup> Determinants of Primary Education Outcomes in Developing Countries: Background Paper for the Evaluation of the World Bank's Support to Primary education, 2004, p. 22.

<sup>23</sup> Ibid.

# Box 1: The Dakar EFA Goals

- 1 Expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children.
- 2 Ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, have access to and complete free and compulsory primary education of good quality.
- 3 Ensuring that the learning needs of all young people and adults are met through equitable access to appropriated learning and life-skills programmes.
- 4 Achieving a 50 per cent improvement in levels of adult literacy by 2015, especially fro women, and equitable access to basic and continuing education for all adults.
- 5 Eliminating gender disparities in primary education by 2005, and achieving gender equality in education by 2015, with a focus on ensuring girls' full and equal access to and achievement in basic education of good quality.
- 6 Improving all aspects of education and ensuring excellence of all so that learning outcomes are achieved by all, especially in literacy, numeracy and essential life-skills.

# Box 2: Education-related Millennium Development Goals

**Goal 2:** Achieve universal primary education. Target: Ensure that by 2015 children everywhere, boys and girls, will be able to complete a full course of good quality primary schooling.

**Goal 3:** Promote gender equality and empower women. Target: eliminate gender disparity in primary and secondary education, preferably by 2005, and at all levels of education no later than 2015.

Current global and regional teacher supply trends are not encouraging. According to the UIS Report (2006), <sup>24</sup> more than 18 million teachers would be needed (between 2004 and 2015) worldwide to meet the Universal Primary Education (UPE) goal. Sub-Saharan Africa alone would need close to 4 million primary school teachers to meet the same goal.

In view of the apparent insufficient supply of teachers and the prevalent employment of unqualified, volunteer, contract or para teachers in Sub-Saharan Africa, Education International decided to carry out a study focusing on five major teacher issues. The study, which was carried out between October 2006 and December 2007, focused on Teacher Supply, Teacher Attrition, Teacher Remuneration and Motivation, Teacher Absenteeism and Union Involvement in Policy Development. The study was carried out in six Anglophone sub-Saharan African countries. These are: The Gambia, Kenya, Lesotho, Tanzania, Uganda and Zambia.

<sup>24</sup> UNESCO Institute of Statistics Publication, Teachers and Educational Quality: Monitoring Global Needs for 2015, 2006, p 100

# Objectives of the survey

The overall goal of the survey was to investigate various issues that affect the recruitment or supply and retention of qualified teachers in The Gambia, Kenya, Lesotho, Tanzania, Uganda and Zambia. The specific objectives of the survey were:

- 1 To identify the teacher supply needs of the participating countries;
- 2 To determine the existence (or nonexistence) and prevalence (or nonprevalence) of unqualified, volunteer, contract or para-teachers in the Anglophone sub-Saharan African countries under investigation;
- 3 To solicit the stakeholders' views about the effectiveness of unqualified, volunteer, contract or para-teachers in facilitating quality teaching and learning;
- 4 To determine the extent of, and main causes of teacher attrition in the participating countries;
- 5 To find out if brain-drain was a major problem in the education sector in the countries under investigation, and if it was, what its main causes were;
- 6 To find out how the teachers' remuneration levels compared with those of the past and with those of their counterparts with similar and comparable qualifications and levels of training, both within, and outside the public service;
- 7 To find out how the remuneration levels of unqualified, volunteer, contract or para teachers compared with those of regular teachers;
- 8 To determine the teachers' general level of motivation in the participating countries;
- 9 To find out if teacher absenteeism was a major problem in the countries under investigation and, if it was, what its major causes were; and
- 10 To determine the extent to which teacher unions in the participating countries were involved in education policy development.

# Methodology

The study applied three main strategies for data collection. These were:

- 1 A desk study of each individual country's profile, education system, including education policies and primary indicators (GER, NER, adult literacy rate, transition rate, drop-out rate, school life expectancy, etc). Several official documents were analysed, including policy documents and education statistical bulletins.
- 2 A questionnaire, which was completed by unions and education authorities.
- 3 Country visits and meetings/discussions/interviews with various stakeholders-union leaders, ministry of education officials, teachers, UN agencies (UNESCO, UNICEF and the World Bank), EFA country coalitions and civil society organisations.

The various sources of information used in this survey ensured triangulation and improved the validity and reliability of the data and the study's findings.

However, it is important to note that educational statistics were not always readily available in a number of countries. Generally, most of the unions did not have basic educational statistics such as the total number of teachers in the country, the number of unqualified teachers etc.

# The demographic and educational contexts

As already stated, all the six countries included in this study are Anglophone sub-Saharan African countries. Three of them are from east Africa (Kenya, Uganda and Tanzania), two of them from Southern Africa (Lesotho and Zambia) and one of them is from west Africa (The Gambia). These countries constitute 27.3 per cent of the 22 Anglophone African countries. Although conditions vary from one country to another, the findings of this survey may be considered

a fair representation of the teacher issues in aub-Saharan anglophone African countries. The table below shows some of the six countries' basic demographic indicators. The statistics refer to the year 2005.

**Table 1: Participating countries at a glance (2005)** 

	Gambia	Kenya	Lesotho	Tanzania	Uganda	Zambia
Population, total (millions)	1.5	34.3	1.8	38.3	28.8	11.7
Population growth (annual %)	2.6	2.3	-0.2	1.8	3.5	1.6
Surface area (sq. km) (thousands)	11.3	580.4	30.4	945.1	241.0	752.6
Life expectancy at birth, total (years)	56.3	48.3	35.6	46.2	48.9	38.1
Mortality rate, infant (per 1,000 live births)	89.0	78.5	80.0	78.4	80.2	102.0
Literacy rate, youth female (% of females ages 15-24)	-	80.7	-	76.2	71.2	66.2
GNI (current US\$) (billions)	0.4	18.0	1.8	12.1	8.5	6.7
GNI per capita, Atlas method (current US\$)	290.0	530.0	960.0	340.0	280.0	490.0
Prevalence of HIV, total (% of population ages 15-49)	2.4	6.1	23.2	6.5	6.7	17.0

Source: World Development Report

As shown above, two of the countries under investigation may be regarded as small states (The Gambia and Lesotho) with a population of less than 2 million each. Three of them may be regarded as large states (Kenya, Tanzania and Uganda), while one of them may be regarded as an average state(Zambia). The HIV prevalence rate is very high in most of the countries. For example, Lesotho has a prevalence rate of 23.2 per cent, while Zambia has an equally high rate of 17 per cent. In Kenya, women constitute 61.7 per cent of the adults (15+) living with HIV. According to Avert, an HIV and AIDS charity, Kenya has 1 100 000 AIDS orphans, the fourth highest number in the world.<sup>25</sup>

All the six countries included in this survey have very low Gross National Income (GNI) per capita, with the exception of Lesotho.

According to the 2007 *EFA Global Monitoring* 

Report, over 50 per cent of the population in each country lives on less than \$2 per day. For example, in Zambia, a staggering 87.4 per cent of the population lives on less than \$2 per day. In the Gambia, 82.9 per cent of the population lives on less than the same amount per day. This implies that poverty is a major challenge confronting these countries. Such enormous challenges usually make it difficult for the affected countries to achieve AFA targets and MDGs.

The above table indicates that the pre-primary gross and net enrolment ratios are generally low and below the global average gross enrolment ratio of 37 per cent, except for Kenya. At primary level, the gross and net enrolment ratios are higher, except for the Gambia, whose ratios are 81 and 65 per cent, respectively. At secondary level, the gross and net enrolment ratios are very low, except for

<sup>25</sup> This information is available on the Avert web site: www.avert.org

Table 2: Education indicators in the participating countries

	Gambia	Kenya	Lesotho	Tanzania	Uganda	Zambia
Gross Enrolment Ratio (Pre-primary-2004)	18	53	31	29	2	-
Gross Enrolment Ratio (Primary-2004)	81	111	131	106	118	106
Gross Enrolment Ratio (secondary, 2004)	59	87	45	-	16	26
Net enrolment ratio (pre-primary, 2004)	-	29	-	29	-	-
Net enrolment ratio (pre-primary, 2004)	65	76	86	91	-	91
Net enrolment ratio (secondary, 2004)	47	40	23	-	13	24
School life expectancy (1999)	7.8	9.9	10.9	5.1	10.4	6.5
Adult literacy rate (2004)	26	74	82	69	67	68
Transition rate (primary to secondary, 2003)	-	95	63	33	36	54
Drop-out rate (primary, 2003)	-	27.2	43.1	26.6	59.3	12.5

Source: EFA Global Monitoring Report, 2007

The Gambia and Kenya. However, the Gross Enrolment Ratio (GER) of 87 per cent is influenced by the grade 8 GER, while the transition rate of 95 per cent reflects transition from grade 7 to 8(both primary), as opposed to transition from primary to secondary level. The actual primary to secondary transition rate (Grade 8 to 9) stood at 60 per cent in 2007. Lesotho's adult literacy rate is very low (26 per cent) and below half of that of other countries in the region. The drop out rate is generally high, particularly for Lesotho and Uganda (43.1 and 59.3 per cent, respectively).

# Summary of main findings

# **Teacher supply**

Four of the six countries involved in the survey (66.7%) had a shortage of qualified teachers. These are The Gambia, Lesotho, Tanzania and Uganda. The shortages affect both primary and secondary levels. For example, in 2006, 44 per cent of the primary school teachers and 42 per cent of the secondary school teachers in Lesotho were unqualified.

Kenya and Zambia do not have adequate teachers in their schools (evidenced by high pupil-teacher ratios), yet they have so many qualified teachers roaming the streets. These countries have failed to significantly increase their teacher stock due to budgetary considerations and agreements reached with international financial institutions.

Teacher shortages seem to be more acute in remote rural areas. All six countries have a shortage of mathematics and science teachers. However, the shortages are less acute in Kenya, due to the country's programme to train, recruit and retain mathematics and science teachers. The region needs to increase output from its teacher training institutions and to recruit and retain qualified teachers, including mathematics, science and Information and Communication Technology (ICT) teachers.

## **Teacher attrition**

The average rate of teacher attrition in the six countries is 4 per cent. Most of the attrition is

Table 3: Teachers' gross salaries per month in US\$ (2006)

Level	The Gambia	Kenya	Lesotho	Uganda	Tanzania	Zambia
Primary	60	152	177	115	20	200
Lower secondary	75	272	265	144	95	250
Upper secondary	90	305	638	260	125	325

attributed to retirement, resignations, death and dismissals. Many respondents felt that death due to AIDS related illnesses has contributed to the high rate of attrition, especially in Lesotho and Zambia. Brain drain has also contributed to the high level of teacher attrition in Zambia, particularly at secondary level.

The main cause of brain drain was cited as low salaries and poor conditions of service. Therefore, the best way of reducing teacher attrition is to address its root causes, particularly HIV and AIDS, low salaries and poor working conditions.

#### Teacher remuneration and motivation

The survey reveals that teachers' salaries are generally low and below the poverty datum line or cost of living. Conditions of service are also poor and many schools do not have accommodation, or adequate accommodation for teachers. The situation is even worse for unqualified teachers, most of whom earn between 40 and 60 per cent of the salary of the lowest paid qualified teacher. The table below shows the gross salaries of teachers in the six countries in US dollars.

The low salaries and poor conditions of service have contributed to the high level of brain drain in countries like Zambia, and to a general decline in the status of the teaching profession in all the six countries. As a result, teaching has become a stepping stone or a profession of last resort in many of the countries visited. For example, in Tanzania, some teachers have discouraged their own children from taking up teaching as a career. There is an urgent need to improve the teachers' conditions of service.

All the countries surveyed did not have proper or effective collective bargaining structures in place, except Kenya. For example, in The Gambia, the salaries of civil servants, including teachers, are determined by a commission, while in Tanzania they are usually determined and announced by the country's political leadership(usually during state occasions). The trade union leaders in all the six countries expressed the need for training in collective bargaining/negotiations, policy development and advocacy. They indicated that they were not fully equipped or prepared to confront influential international, regional and national financial institutions, donor organisations and other stakeholders on a level playing field. Teacher absenteeism

Teacher absenteeism was reported to be a problem (not a major one, though) in 50 per cent of the countries (Lesotho, Tanzania and Zambia). The main causes were irregular pay days (e.g. in Tanzania and Zambia) and illness, probably related to HIV and AIDS. Teachers from rural areas usually travel to urban areas or district centres to collect their pay and this may take up to 3 or more days, especially when the processing of salaries is delayed. Meanwhile, the pupils or students would be losing valuable learning time, while the few teachers who might have remained at the school would be overburdened with heavy teaching loads. Teacher absenteeism may be addressed by regularising the pay days and by scaling up HIV and AIDS activities. Union involvement in policy development

Teacher unions are generally involved in policy development. However, in most cases, the involvement comes at a later stage of the policy making process and is not institutionalised. However, in countries like The Gambia, Kenya and Uganda, the involvement of the union is provided for in the country's legal statutes, such as the Education Act or in the education policy papers or plans. Generally, all the unions were working closely with civil society organ isations like Education for All (EFA) country coalitions and this strengthened their ability to influence education policy. Active involvement in educational or professional issues, over and

above the bread and butter issues, earned the unions a lot of respect from the government and other stakeholders. However, the unions should ensure that they maintain a fair balance between their trade union and professional roles. Collaboration between the EI affiliates and UN agencies, such as UNESCO, UNICEF and the World Bank, was either weak or non-existent, in most countries, and needs to be strengthened.

# Recommendations

# Recommendations to teachers' unions

The teachers' unions should:

- R1 Oppose the recruitment of unqualified teachers and lobby their governments to train and recruit more qualified teachers. This should include both preservice and in-service training targeted at unqualified and under qualified teachers.
- R2 Influence the content and format, including duration, of teacher education and training programmes. The unions should strongly oppose the introduction or continuation of crash programmes such as the Distance Teacher Education Programme (DTEP) in Lesotho and the licencee teacher programme in Tanzania.
- R3 Recruit unqualified, volunteer, contract or para teachers as members and make representations to governments on behalf of these teachers.
- R4 Scale up HIV and AIDS education and support programmes for their members and students in order to reduce the impact of the pandemic on the education sector. The EFAIDS Programme, initiated by EI, in

- partnership with the World Health Organisation (WHO) and the Education Development Center (EDC), and implemented by the unions, has made tremendous impact. This was confirmed by the unions in all the 5 countries involved in the programme, with the exception of the Gambia, which is not. The Programme should be continued and expanded to reach as many beneficiaries as possible, within the shortest period of time.
- R5 Lobby their governments to set up, or improve upon existing collective bargaining structures. Those countries without an effective collective bargaining framework may learn from their counterparts in other countries, as was the case with Zambia, which sent government and trade union leaders to South Africa for the above purpose. Collective bargaining structures and systems should be fully grounded in ILO Conventions and conform with international labour standards and norms.
- R6 Fight for the improvement of teachers' salaries and other conditions of service, including accommodation and incentives to attract teachers to remote rural areas.R7. Lobby their governments to regularise pay days, where necessary, in order to reduce teacher absenteeism

- and minimise disruption to teaching and inconvenience to teachers and other education employees.
- R8 Strike and maintain a fair balance between trade union and professional roles. Such a balance means teacher trade unions should fight, not only for bread and butter issues (for the improvement of the teachers' conditions of service), but also for access to quality publicly funded education for all.
- R9 Collaborate and work very closely with civil society organisations and other bodies, particularly the EFA country coalitions.
- R10 Collaborate and work very closely with UN agencies such as UNESCO, UNICEF the World Bank and others in promoting quality public education for all.

# **Recommendations to governments**

Governments should:

- R16 Train more qualified teachers. This should include both pre-service and inservice training targeted at unqualified and under qualified teachers. This calls for institutional capacity building and expansion. For example, countries like Zambia and Tanzania may consider upgrading some of their primary teacher training colleges to secondary or high school teacher training institutions.
- R17 Organise and carry out in-service and support programmes for qualified teachers in collaboration with teachers' unions. Such training programmes may focus on school leadership, Information and Communication Technologies (ICT) and on other specific subject areas and pedagogy.
- R18 Recruit more teachers in order to meet the Education for All (EFA) targets and education related Millennium

- Development Goals (MDGs). This may call for the raising of a country's teacher stock in line with enrolment trends, with a view to keeping the pupil-teacher ratios in line with international norms and standards. Governments should avoid setting unrealistic targets or staff/wage bill caps in their agreements with regional or international financial institutions.
- R19 Strengthen distance teacher training programmes, where these exist, for example, by increasing the period of initial/pre-service training.
- Increase educator's salaries so that they R20 are in line with the cost of living prevailing in the country and above the poverty datum line. Improve the education employees' general conditions of service. This should include the provision of accommodation, the payment of allowances and other fringe benefits. Efforts should be made to improve the status of teaching and to make the teaching profession attractive to the best school leavers. The Fast Track Initiative (FTI) norm that teachers' salaries be 3.5 times GDP per capita, given in the EFA Indicative Framework, should not be a barrier to increasing the teachers' salaries, as it is a mere guide (it is only meant to be indicative, not prescriptive).
- R21 Regularise paydays, where necessary, and ensure that these are adhered to by local or paying authorities. Since most salary delays seem to occur where the payment of teachers' salaries is done through local authorities, the Governments may consider centralising the payment of salaries. This may be done electronically through the banks.
- R22 Ensure that there is a clear career path for teachers and other education employees. Such a path may include the promotion structure, parallel progression and salary upgrading.

R23 Engage teacher trade unions, associations and organisations and consult with them on educational, labour and other relevant issues in an institutionalised manner. Such institutionalised dialogue enriches educational policies and ensures ownership on the part of the union.

# Recommendations to regional and international financial institutions

The regional and international financial institutions such as the African Development Bank, the World Bank and the IMF should:

R24 Desist from supporting or encouraging the recruitment of unqualified, contract or para- teachers, as this negatively affects the quality of education.

- R25 Avoid setting up unrealistic targets and caps on teacher establishments and educators' salaries, to be met by recipient countries. The FTI norm that teachers' salaries be 3.5 times GDP per capita, given in the EFA Indicative Framework, should not be used as a barrier to increasing the teachers' salaries. The framework should be considered indicative, not prescriptive, as is often the case when it comes to approving country plans.
- R26 Continue to support educational programmes, including access to early childhood education programmes, free primary education and secondary and tertiary education of good quality, teacher training, institutional capacity building and other progressive educational initiatives.

# **Appendix 3**

# Issues of Gender and Ethnicity in Commonwealth Teacher Recruitment and Migration — The Case of Twelve Teachers

## Roli Degazon-Johnson

# **Abstract**

The study is based on a series of interviews and focus groups which explored the experiences of 12 Commonwealth teachers six male and six female — 11 of whom were recruited to work in the United Kingdom between 2000 to 2004, the period which preceded the adoption of the Commonwealth Teacher Recruitment Protocol (CTRP). The evidence from the interviews suggested that the recruiters of the teachers had changed the terms and conditions of their contractual agreement unilaterally, reneged on salary and pay arrangements, discouraged teachers from joining unions and used intimidatory measures to obtain their compliance. The need for stronger regulation of recruiters and their clients — schools and local education authorities — is stressed as is the importance of implementation of the CTRP by all Commonwealth member governments.

# Introduction

There is now abundant evidence that in the United Kingdom during the 5-year period from 1999 to 2003 there was targeted recruitment resulting in large scale migration of teachers from a number of Commonwealth countries in Africa, Asia and the Caribbean. The recruitment campaigns were principally undertaken to address a shortfall in teachers which has arisen in the United Kingdom in general, but in England in particular. Studies by Ochs<sup>26</sup> (2003) reveal that over the three-year period of 2000-2003, a high volume of work permits were provided by the United Kingdom Home Office to teachers from

countries such as Zimbabwe (898), Ghana (457), India (457), Canada (898), South Africa (4,702) and even small states such as Jamaica (974) in the Caribbean.

# Design and conduct of the study

This study on Commonwealth teacher mobility and migration specifically concerns the experiences of 12 teachers, 11 of whom were recruited to the United Kingdom during the period 2000—2004 which immediately preceded the adoption of the Commonwealth Teacher Recruitment Protocol by Ministers of Education at Stoke Rochford in Lincolnshire in 2004.

The purpose of this investigation was to determine the kinds of experiences that Commonwealth teachers recruited to the United Kingdom were exposed to by recruitment agencies, businesses and schools. As the researcher, I sought to learn from Commonwealth teachers themselves—a primary souræ—about their experiences through a combination of interviews and focus groups. The research methodology was principally qualitative, developing cases from the personal experiences of subjects from a distinct population group, that of teachers from countries which are members of the Commonwealth and who were recruited to the UK during the period 2001—2003.

# **Interviews**

The interviews were designed with the purpose of obtaining the responses of the teachers to the terms and conditions under

Ochs, K (2003). A Summary of Teaching at Risk — Teacher Mobility and Loss in Commonwealth Member States. London: Commonwealth Secretariat.

which they were recruited in their home country, the conditions of employment which they found on arrival, any contractual changes which they experienced and the reasons whereby they were moved to contact a union to represent them. Whilst the interview schedule used was intended as a preliminary guide to the direction of questioning, it was not rigidly adhered to and if required questions which probed for more information were asked that are not those specifically on the schedule.

# Focus groups

The focus group method was proposed in concert with the interviews which though often providing excellent primary information from a subject, with sensitive issues many individuals may have been reticent to be interviewed alone. It was intended that through focus groups with 'safety in numbers', subjects may have been more confident if they realised that they were part of a group, all of whom were sharing their stories.

# Risks and limitations

The sensitivity of recruited teachers who have been subjected to detriment or exploitation may have caused some subjects not to wish to share their experiences for fear of victimisation had the information they provided been made public. Hence it was anticipated that the information sought may not have been easy to obtain. Also, the study did not undertake to seek or verify with recruiting agencies or businesses, that the information obtained from the Commonwealth teachers was valid, unless such information was found to be easily available. It was not expected that those agencies involved in unethical — and of late, illegal - practices would be willing to be interviewed about them, as this information could be highly embarrassing. Rather, the researcher sought information about recruitment practices and experiences from those most affected — the recruited teachers directly or through the organisations which represented them. However, the fact that the

Table 1: Commonwealth Teachers recruited by agencies/businesses/L Interviewed: January—March 2005 (N=12)

Case	Pseudonym	Gender	Country of Origin	Age range (years)
1.	Mutwa	Male	Kenya	28-32
2.	Larry	Male	Zimbabwe <sup>27</sup>	33-37
3.	Julius	Male	Uganda	43-47
4.	Sylvester	Male	Kenya	33-37
5.	Alfred	Male	Zimbabwe	43-47
6	David	Male	India	38-42
7.	Ntombi	Female	South Africa	38-42
8.	Aurora	Female	United Kingdom	53-57
9.	Sarah	Female	Botswana	28-32
10.	Penelope	Female	Kenya	28-32
11.	Slakisha	Female	Jamaica	33-37
12.	Sonia	Female	Jamaica	38-42

Note: The names of the Commonwealth teachers are pseudonyms used to protect their anonymity.

<sup>27</sup> While it was still a Commonwealth member in 2002 when 'Larry' was recruited, Zimbabwe withdrew its membership from the Commonwealth in 2003 following the Commonwealth Heads of Government Meeting in Abuja, Nigeria.

information received from teachers was not verified or validated, through a triangulation process, for example, also means that there was the risk of embellishment of the information by those teachers who may have wished their cases to appear "extreme".

# The investigation

The investigation comprised interviews with 12 Commonwealth teachers, 11 of whom were recruited by agencies and businesses to the United Kingdom. The names of the Commonwealth teachers are pseudonyms used to protect their anonymity. The names of the recruitment agencies and businesses have also been changed to pseudonyms. However, the unions which provided assistance in various forms to some of them are named. All other information provided is based on the exact information provided to the interviewer.

In January 2005, this researcher observed and gathered information in two Focus Group sessions with a group of Commonwealth teachers who had been recruited to the United Kingdom during the period 2001—2003. This researcher also used the opportunity to speak with many of them individually, to share the interview schedule and to invite their participation in telephone interviews which would be conducted following the conclusion of the sessions.

No reticence or unwillingness to participate was demonstrated by any of the subjects invited for interview. As each interview would take approximately 45 minutes, it was considered preferable to determine a time when the subjects could, in the comfort of their homes, respond to the questions asked and share their experiences with the researcher. The researcher found all subjects who were invited for interview, highly cooperative and quite eager to share their stories. Information far in excess of what is provided in the cases was also shared, but was left out so as to keep the length of the cases trim.

# Adjustment of sampling procedure

Recognising that based on the initial interviews, the majority of the subjects were from Southern African countries, apart from one Asian Indian subject, the researcher also went beyond the limits of the Focus Group and sought interviews with teachers who were not part of the initial Focus Groups, including a supply teacher from the United Kingdom. These additional subjects were usually arrived at by what is accepted in qualitative research and known as the 'snowball' or 'cascade' method, that is, obtaining a sample of subjects by asking one subject to identify others in situations similar to their own. The method is most frequently used when the information being sought is of a confidential or personal nature and not readily and easily available.

The cases are representative of teachers from a span of Commonwealth countries and of the experiences recounted by all twelve subjects, despite the fact that each case has its unique features. However, the one case of a United Kingdom supply teacher, Aurora, presents an interesting 'comparator' to those of the other eleven teachers interviewed.<sup>28</sup> The term "Comparator" in employment law is the position of a worker which, in cases of alleged detriment or discrimination, is proposed as apt for comparison to the position of the disadvantaged worker usually because they have received preferential treatment. The term is usually found in cases of discrimination in employment. Its use is employed in this context in order to compare the experiences of a British teacher employed part-time to a local education authority with that of her Commonwealth counterparts recruited to work in the same country.

# Biographical data and professional background of the teachers

Table 4 presents the profile of the Commonwealth teachers interviewed, from the standpoint of their qualifications and years of experience. Of the 12, 1 was from the United Kingdom (UK), 8 from countries in Southern Africa, 1 from India and 2 from the Caribbean.

The profile presented is of teachers with first and second degree university qualifications—a number in Science and Mathematics—whose work experience ranges from as little as 2, to as many as 19 years of teaching. In a recent presentation about the re-launch of the 'Quality Mark' in 2005, a representative of the UK Department for Education and Skills proposed that the dominant profile of an overseas teacher in the UK is a young person from South Africa or Australia with no intention of staying beyond 12—18 months. The profile of teachers interviewed for this study is clearly in stark contrast to this DfES

profile, and it is of interest that the one South African teacher interviewed, 'Ntombi', brought 15 years teaching experience with her to this country. Indeed the average teaching experience of the sample was 10.5 years. Given that on the basis of Table 2 presented in Chapter 1 in which the total number of work permits approved for teachers by the UK Home Office between 2001—2003 was 12, 844, of which the combined total for South Africa and Australia was 7,381, it may be assumed that a rather different profile may apply for the remaining 5, 463 from the 36 other Commonwealth countries listed.

# Reasons for being recruited to teach in the UK

Eleven of the 12 teachers interviewed—all excepting for Aurora from the UK - came to the UK in the hope and expectation of better than that which they had known before. This fact was stated repeatedly despite several of the subjects having had international exposure to teaching in other countries (Julius), having held positions such as head master and head

Table 2: Profile of Qualifications and Teaching Experience of a sample of Commonwealth Teachers recruited by UK recruitment agencies/businesses between 2001—2003 (N=12)

Case	Pseudonym	Gender	Years of teaching	Academic qualifications
1.	Alfred	Male	14	Bachelor's degree and post-graduate diploma
2.	Aurora	Female	10	Master's degree
3	David	Male	17	Master's degree
4.	Julius	Male	19	Bachelor's degree and post-graduate diploma
5.	Larry	Male	10	Master's degree
6.	Mutwa	Male	4	Bachelor's degree
7.	Ntombi	Female	15	Bachelor's degree and post-graduate diploma
8.	Penelope	Female	3	Bachelor's degree
9.	Sarah	Female	2	Bachelor's degree and post-graduate diploma
10.	Slakisha	Female	10	Bachelor's degree and post-graduate diploma
11.	Sonia	Female	18	Bachelor's degree and post-graduate diploma
12	Sylvester	Male	4	Bachelor's degree

Note: The names of the Commonwealth teachers are pseudonyms used to protect their anonymity.

of department (Alfred; Ntombi) and had worked for international agencies such as UNESCO (Sonia). In all cases, the reasons for seeking to teach in the United Kingdom were the desire for an improved quality and standard of living for themselves and for their families through (i) seeking higher earnings (ii) further education and (iii) exposure to a developed country. Even in the case of Aurora, who is a UK resident and applied directly to her local education authority - by-passing recruitment agencies - part-time/supply teaching was undertaken so as to provide more time for her family and because the higher unit earnings, she felt, would compensate for the loss of job security.

# Terms and conditions offered to teachers by agencies, businesses and schools

The 11 teachers recruited from overseas were offered contractual agreements by recruitment agencies/businesses, for periods of between one and two years. In some cases fees were charged for 'services' (Mutwa), 'accommodation deposits' (Alfred and Ntombi), 'travel' (David). In many instances work permits issued by the UK Home Office based on applications by their 'employer'—the recruiter—were for periods of one year only, but their understanding was that once here and in a permanent position, the work permit would be extended by the school to which they would be permanently employed. Many teachers came in the expectation of starting out in temporary positions — which is what they understood 'supply teaching' to mean but in being appointed to permanent positions within a year of their arrival. This was what their recruiters promised them (Mutwa; Larry; Julius; David; Ntombi). The salaries offered and initially received varied from £17,000 to 19,000 per annum, including bonus arrangements. Only Sonia was offered a salary of the level of £25,700.

# Changes in terms and conditions of employment

Changes in the terms and conditions of their employment — unilaterally and without consultation—were experienced by 11 of the 12 teachers interviewed. Salary and pay arrangements in their contractual agreements were experienced by two-thirds of those interviewed. Teachers from Southern Africa and India came to the UK on the understanding that Agency ABC would be paying them on a 'guaranteed pay' basis, so that they could be assured of a salary regular pay—even when a school did not require them for supply teaching. This agreement was changed, at times within weeks of their arrival and the commencement of work, to an arrangement whereby they would be paid only for the actual days worked. Despite offering a higher overall daily wage, by so doing Agency ABC not only reduced their earnings from the annual salary they had offered, but also changed their employment status from that of salaried worker employed to Agency ABC to temporary worker, paid only for days worked. The teachers treated in this manner were offered no choices or options by ABC, who in fact coerced many of the teachers into signing up to a new contract which would increase their vulnerability by providing less secure tenure as well as a reduction in income.

The recruiters—Agencies ABC, DEF, HIJ, and KLM — all reneged on the commitment to find permanent employment for the recruited teachers. Whereas lack of clarification and a clear understanding by some of the recruited teachers as to the meaning of 'supply' may have been partly to blame for them being misled, Agency KLM and the principals of the **Grimsby and Beckfield High Schools certainly** knew that Slakisha and Sonia, for example, would only migrate to take up a teaching positions in situations in which they would be permanently employed, and still encouraged them to proceed to take up positions, for which the principals later told them, they would have to re-apply.

It cannot go unnoticed that the period in which the highest incidence of contract change was experienced was just prior to the Easter and Summer vacation periods in 2002. This meant that as the schools would be closed during these vacation periods and not requiring supply teachers, Agency ABC intended to suffer no financial loss. Instead they appear to have protected themselves from such loss by cutting teachers loose, forcing a new arrangement on them, which would not only make the teachers suffer a significant loss of income, but would change their employment relationship to one of being 'self-employed' as against an 'employee' of the recruiter.

The principal of Slakisha's school was similarly cavalier in changing a verbal agreement, however. Having told her that he had a permanent position to offer her for September 2002, he then advised her in early 2003 that he would have to pay 5,000 sterling to move her from 'temporary-to-permanent', which he said the school could not afford. Could it be that in order to escape from his commitment this "fee" was jointly contrived by the principal and Agency HIJ? Impossible!

# Contact with a teachers' union

Despite Agency ABCs efforts to dissuade their teachers from joining a union, 10 of the 12 teachers interviewed recounted helpful, and in some cases considerable assistance from Members of Parliament (Julius), teachers unions and the NUT in particular. Aurora did not see the need to join a union and Sonia had not found the NUT very helpful when she was seeking their assistance. However, the initiatives of the NUT on behalf of the Southern African teachers recruited by Agency ABC can only be termed admirable.

Based on the various accounts of the Southern African teachers (Larry, Julius and others), followed by confirmation from the union itself, the NUT in September 2002, invited Agency ABC to attend a meeting in which representatives of the UK Home Office were also present. As an outcome of the meeting, Agency ABC agreed to pay the sum of £25,000

to the Teacher Support Network operated by the NUT for teachers in need of assistance.

This was how many of the Southern African teachers were able to benefit from financial assistance and legal guidance about their immigration situation. Through the instrumentality of the NUT, the Home Office also provided extensions of stay, giving the teachers additional time to seek other jobs.

It was during this period that a new ruling emerged in which the Home Office refused to provide recruitment agencies with work permits for teachers they were recruiting. The stipulation was that the work permits had to be with the schools to which they were employed.

One can only ask what would have happened to these teachers were it not for the NUT and the Home Office's initiatives. One must ask how many other Commonwealth teachers have floundered through being entangled in the web of deception that these recruitment agencies — and some school principals - spun on them?

# The teachers today

During the interviews, many of the subjects could tell of other recruited teachers who had in frustration and pain, returned to their countries of origin, mortified at the way they had been treated in the United Kingdom.

Of the teachers interviewed from countries other than the UK, some of whom were former principals and heads of departments, none has been able to find a position of equivalence or similar seniority in the UK. Whilst this is frequently the status of new migrants initially, given the demand for teachers, what has evolved is a situation of deskilling, avoidance in providing vocational training and career development, underemployment and for a majority, other employment for which they have little experience or expertise. The majority of the recruited teachers interviewed were obliged to turn to residential child care and care of the

elderly. The Caribbean teachers have managed to remain in teaching, despite the difficulties of those situations. The Southern African teachers stayed in their residential child and elderly care positions as a work permit was provided them and they were resolute about not returning to their own countries until they achieve the objectives for which they came, of study and improved compensation.

# Analysis and discussion of the research findings

'The industrialised countries have the means, but have planned poorly [and] are now buying human resources from overseas ... at the end of the line, it is always the lowest income country that pays the education bill.' (Van der Schaaf, Education International, 2005)<sup>28</sup>

In an effort to 'recall the need to protect workers against abuses'<sup>29</sup> whilst 'recognising the role which private employment agencies may play in a well-functioning labour market',<sup>30</sup> the International Labour Organization (ILO) at its 85<sup>th</sup> session in June 1997 adopted the Private Employment Agencies Convention C181, 1997, in the same year that there was a change from Conservative to Labour government in the UK.

In Article 4 of the Convention<sup>31</sup>, which was a revision of the ILO Fee-Charging Employment Agencies Convention (revised) 1949, the right of workers recruited by private employment agencies to freedom of association and to collective bargaining is stressed as is Article 5, the right of the employment agency worker not to suffer discrimination on the basis of race, colour, sex, religion, political opinion, national extraction, social origin, age or disability. Articles 8.2 and 10 of the Convention state that:

'Where workers are recruited in one country for work in another, the members concerned shall consider concluding bilateral agreements to prevent abuses and fraudulent practices in recruitment, placement and employment' (Article 8.2)

#### and that

'adequate machinery and procedures involving ... the most representative employers and workers organisations (shall) exist for the investigation of complaints, alleged abuses and fraudulent practices concerning the activities of private employment agencies.' (Article 10)

It is not surprising that to date, whilst Spain, Finland, Italy and the Netherlands have ratified this Convention, the aim of which is to protect temporary workers, the United Kingdom has not.

Of the four UK recruitment agencies or businesses involved, Agency ABC stands out for the volume of fraudulent and abusive practices in particular to which their recruits were subjected. Agency ABC breached contractual obligations by:

- Offering an annual salary and bonus to teachers to which the agency did not adhere (Mutwa: Larry; Julius; Sylvester; Alfred; David; Ntombi; Sarah; Penelope)
- Coercing recruits into a change of contract mid-year without their prior knowledge or agreement, rescinding one year contractual agreements,. (Mutwa: Larry; Julius; Sylvester; David; Ntombi; Sarah; Penelope)
- Changing the emoluments by agreeing to pay a fixed salary, whether they worked or not, thereby treating them as employees of

<sup>28</sup> Wouter Van der Schaaf, Education International, in a Commonwealth Secretariat consultation on the 'Recruitment and Migration of the Highly Skilled', January 2005, London.

<sup>29</sup> Preamble to Private Employment Agencies Convention C181, 1997, Bureau for Workers Activities. International Labour Organization, Geneva.

<sup>30</sup> Ibid.

<sup>31</sup> Ibid.

the agency, only to change this after a matter of months, to payment for days worked only.

- Using the threat of withdrawal of work permits provided by the UK Home Office to coerce teachers into accepting new terms. (Mutwa; Larry; Julius; Sylvester; David; Ntombi; Sarah; Penelope)
- Misleading recruits by giving the impressions that 'supply teaching' was a temporary arrangement which would lead to permanent jobs, when there is some evidence that they sought to prevent teachers obtaining permanent appointments at schools (Alfred).
- Charging a fee for 'accommodation finding' services which were grossly substandard in some instances (Ntombi)

However, Agency ABC was not alone in committing practices which contradict the spirit and intent of the statutory environment that has been developed to protect the rights of temporary and part-time workers. Opportunities to move from temporary to permanent positions appear to have been thwarted and prevented by agencies and schools in a number of instances (David; Slakisha; Alfred; Sonia.)

# Are you an employment business or agency?

Regulation 9 (i) and (ii) of the UK Conduct of Employment Agencies and Employment Businesses Regulations 2003<sup>32</sup> stipulates that an employment agency or business may <u>not</u> claim, when introducing or supplying a workseeker or hirer, to be acting as an employment agency to the work seeker and at the same time acting as an employment business to the hirer or vice-versa. Agencies DEF and HIJ conveyed the strong impression to their teachers — and may have colluded with school principals in stating — that they were being employed to permanent positions in schools, a

recruitment agency function, when they were in fact being employed to the recruitment businesses (Slakisha; Sonia).

All recruitment businesses in this study, used the temporary nature of the employment relationship to the detriment of the recruited teacher through lack of clarity in the information provided in terms of whether they were recruiting teachers for permanent positions in schools or whether they were recruiting temporary workers for their own agencies. This fact applied to 11 of the 12 teachers. In the cases of Slakisha and Sonia. they were encouraged by the principal's of the schools interviewing them, to immigrate on the offer of permanent positions in their schools, only to change this offer as the school year drew to a close and, in the case of Slakisha, to require her to re-apply for her own position.

# Fees for 'work-finding', 'additional services' and 'restrictions on charges to hirers'

The matter of fees in general occupies a significant portion of the Conduct of Employment Agencies and Employment Businesses Regulations 2003. The regulations stipulate that it is unlawful for an employment agency or business to charge fees for providing 'work-finding' services and that the job-seeker must be informed of any charges that the recruiter may make for 'additional services' and goods that they provide. Regulations 26.1 and 26.2 state that the agency cannot charge a fee to a particular work-seeker where it, or any person with whom it is connected, also makes a charge to the hirer who is engaging that work seeker.

In all instances where subjects interviewed were required to pay a fee for 'services', the 'middle-man' in their country of origin appears to have been the recipient, and not

<sup>32</sup> Conduct of Employment Agencies and Employment Businesses Regulations 2003, Statutory Instrument No. 3319, HMSO, UK.

the Agency recruiting them to the UK (Mutwa; Sylvester; David; Penelope). This middleman was also willing to let the payment await the establishment of the recruit in the UK, at least in the cases of Mutwa, Sylvester and Penelope. This may suggest that Agency ABC wished to keep its hands untainted by the stain of accepting a fee for finding work, with the full knowledge that they would receive other fees from the school to which they supplied the teacher through the percentage of the teachers wage which they would 'cream off'.33 On the other hand, it may well be that the 'middleman' took it upon himself to charge these fees, unknown to Agency ABC. However, the same was not true for accommodation deposits and services which would fall under the 'additional services' provision of the regulations.

Several subjects paid amounts in excess of £250 to sources within, if not connected to Agency ABC, to have accommodation awaiting their arrival in the UK. The standard and quality of this 'accommodation-finding' service is very much open to question, when Ntombi, for example, found that having paid £250 for her accommodation, she was placed in a house which she had to share with a family and their absent son, whose clothes filled the cupboard in her room. Ntombi was made by her 'hosts' to leave the premises at 7 am each morning and not to return until 7 pm. in the evening, all this in the coldest time of the British winter, February—March. Upon requesting a refund of her money, she was advised that she was obliged to remain in these conditions for eight weeks.

The 2003 Regulations<sup>34</sup> also address the issue of transfer fees when a temporary workers moves to undertake permanent employment in the place where they have been employed on a temporary basis. Regulation 10 is to ensure that employment businesses do not use transfer

fees unreasonably as a means of discouraging or deterring hirers from offering permanent work to temporary workers. Whilst there is a suggestion of this in the cases of Alfred and Penelope, it is writ large in the case of Slakisha, who was told by the principal of her school that the school could not afford to pay the 5,000 sterling which they would be charged by Agency HIJ, if they wished to move her from temporary to permanent employment.

It is worthy of note that at just around the same time that Slakisha was advised of this situation, she was also advised by her contact in Agency DEF, that he had moved to another agency HIJ. There is a provision in the 2003 Regulations<sup>35</sup> preventing hirers from having workers who have been providing a temporary service through one agency, and whom they wish to employ permanently, supplied to them through a different employment business, in an effort to avoid paying the "temp-to-perm' fees. This could be the reason why the contact in Agency DEF had moved to HIJ, in an effort to circumvent this regulation.

# Variation in the terms of an agreement

Whilst all subjects interviewed with the exception of for Aurora, experienced a change in the terms and conditions of their contract, the Southern African teachers and David from India experienced variations that were both harsh and extreme. Having migrated from their countries with contractual agreements that they would be paid a fixed annual salary and bonus, they were instructed within months of arriving in the UK, that there contracts were changed, and coercive means were used to get them to sign up to the changes.

Regulations 14.4 and 14.6 of the Conduct of Employment Agencies and Employment Businesses Regulations 2003 state that an

<sup>33</sup> The term 'cream-off' was used by Aurora, the only UK teacher interviewed in the sample, who declared that she went directly to the LEA and avoided agencies for the reasons that they were known to keep a significant portion of the supply teachers pay for themselves

<sup>34</sup> Conduct of Employment Agencies and Employment Businesses Regulations 2003, Statutory Instrument No. 3319. HMSO, UK.

<sup>35</sup> Ibid.

employment agency or business may only vary the terms it has agreed with a workers if the worker agrees to the variation. It must also not make the continued provision of any services to a work-seeker conditional on the work-seeker agreeing to any variation in the terms such as a change in the pay rate. Agency ABC had no regard whatsoever for regulations such as these, but threatened teachers with "redundancy", work-permit withdrawal and "repatriation" if they did not sign up to the revised contract.

# Qualification recognition, equivalencies and qualified teacher status

There is a European Union Directive on a general system for the recognition of higher education diplomas awarded on completion of professional education and training of at least three years duration (89/48/EC) 36 as well as Directives 89/49/EC37 and 92/51/EC38 which provide for 'mutual recognition' and hence equality of treatment in education qualifications, which operates within the European Union, despite the many different languages spoken in the union. The point was made that despite these linguistic and systemic differences in education, qualified EU professionals can move freely throughout the EU, but the situation is quite different where Commonwealth professionals are concerned.

In their interviews Sonia, Slakisha and Julius spoke of the Qualified Teacher Status which they did not have, and were not told about by either their agencies or their schools, until they arrived in the UK. They were treated—and paid — by their schools as 'unqualified' teachers despite being university graduates with post-graduate qualifications and combined, a total of 47 years of teaching experience between them. It was only upon

attending an NUT conference that Slakisha learnt that it is the responsibility of the school principal to assess and determine the level at which the teacher should be paid, and that principals have the option of placing an experienced and qualified teacher recruited from overseas at a higher level on the pay scale than that of an unqualified teacher.

This would appear to be a form of discrimination and detriment to the Commonwealth teacher recruited from overseas, who categorised as an 'unqualified teacher' is subjected to a lower pay scale until they obtain the UK certification of Qualified Teacher Status. What is especially unfair and detrimental is that, they were sought after by UK recruiters, as they are English-speaking, educated in institutions founded on the British system of Education, and can provide a cultural dimension to many British schools, whose students reflect a high level of multicultural diversity. Yet, seduced by UK recruitment agencies and school principals to come to the UK, they are advised on arrival that their qualifications do not measure up.

The role of UK-NARIC, frequently referred to by the Southern African teachers in particular, is of particular import, as they are deemed a 'clearing house' for the assessment of qualification equivalencies in the UK, and approved the qualifications of all those teachers from Southern Africa recruited to this country. Yet upon arrival in their schools, the qualification status of the recruited teachers was changed so that they were not treated as other teachers of similar qualifications and experience. The Council for Racial Equality (CRE) Code of Practice for the Elimination of Racial Discrimination recommends that:

'overseas degrees, diplomas and other qualifications which are comparable with UK qualifications should be accepted as

<sup>36</sup> Council Directive on a general system for the recognition of higher education diplomas awarded on completion of professional education and training of at least three years duration (89/48/EC) in Blackstone's EC Legislation 2003—2004, Nigel Fosters (ed.). OUP, UK

<sup>37</sup> Ibid.

<sup>38</sup> Ibid.

<sup>39</sup> Para. 1.13 (c) of the CRE Code of Practice for the Elimination of Racial Discrimination, p. 467

equivalents, and not simply be assumed to be of an inferior quality'.<sup>39</sup>

Such treatment of temporary workers would seem to rule out the intention of much recent European social policy designed for improvement in the living and working conditions of — not citizens of Europe but — 'workers in the European Community', be they fixed term, part-time, temporary or seasonal workers. Such treatment renders pointless EU Directive 91/383/EEC 1991<sup>40</sup> to improve the quality of temporary work by ensuring that the principle of non-discrimination is applied to temporary workers, also stating that temporary workers should not be less favourably treated than a 'comparable worker', taking into account seniority, qualifications and skills. Several teachers had difficulty in getting any information about how to pursue studies for the Qualified Teacher Status certification.

Article 5.2 of the draft Directive of the European Parliament and the Council on Working Conditions for Temporary Workers COM/2002/0149<sup>41</sup> calls on member states to:

'improve temporary workers access to training in the temporary agencies, even in the periods between their postings, in order to enhance their career development and employability'.<sup>42</sup>

Sonia is the only teacher to have been informed by her Agency about the possibility of pursuing the QTS qualification. Slakisha has been put by her current school on an accelerated QTS programme about which she heard only after the NUT advised her of its availability and she requested information about it from her school. The Southern African teachers who had to move to work in residential child care will not have an opportunity to "enhance their career development and employability" because they were not within the school system to be able to pursue the QTS programme.

# The teacher's right to trade union membership

Agency ABC in discouraging recruited teachers, Mutwa and Ntombi, from becoming members of trade unions gave a clear signal that the Agency was engaging in such practices to safeguard their own business interests and to protect themselves from exposure for the abusive and unethical practices in which they were engaged. As stated earlier, the right of migrant workers to be represented by a trade union and to enjoy the benefits of collective bargaining has been enshrined in Article 20 of the United Nations Declaration on Human Rights 1948, in Article 6, C97 Migration for the Employment Convention (Revised) 1949 and in the European Convention for the Protection of **Human Rights and Fundamental Freedoms** 1950 for the last half century. The UK Industrial Relations Act (1971), later repealed and replaced by the Trade Union and Labour Relations Act 1974, also asserts this fundamental right of the worker to join, or not to join, a union. Slakisha's agency on the other hand, referred her to a union when she turned to them for assistance following the accusation that she had 'assaulted' a student. In this case the agency — technically her employer — bypassed their responsibility of care and referred her to a union.

Credit has already been given to the role of the National Union of Teachers who acted on behalf of the Southern African teachers especially, in demanding some redress and compensation for the detriment they had suffered and the abuses to which they had been exposed by Agency ABC. The Race Relations Board in Newham, the Commission for Racial Equality and the Socialist Workers Party of the United Kingdom also played important roles in revealing the injustices to which these recruited teachers from the Commonwealth had been subjected and in seeking some compensation for the teachers.

<sup>40</sup> EU Directive 91/383/EEC 1991 in Blackstone's Statutes on EC Legislation 2003—2004, Nigel Foster (ed.). OUP, UK.

<sup>41</sup> Directive of the European Parliament and the Council on Working Conditions for Temporary Workers COM/2002/0149 (Draft) on Europa website — http://europa.eu.int of European Parliament and Council

<sup>42</sup> Ibid.

At the Commonwealth Ministers meeting in September 2004 which approved the Teacher Recruitment Protocol, the General Secretary of the NUT who is also the Convenor of the confederation of Commonwealth Teachers Unions asked that Article 3.12 should read:

'The recruiting agency shall inform recruited teachers of the names and contact details of all teachers unions in recruiting countries.'43

# Issues of gender and ethnicity

The issue of gender is also added to the mix of an already complex situation as many teachers and part-time workers are women and therefore vulnerable to discrimination on the basis of sex. Despite an improved UK statutory framework in the Equal Pay Act 1970<sup>44</sup> and the Sex Discrimination Act 1975, which provide for there to be no differentiation made between male and female workers on the grounds of pay and treatment except where a 'genuine occupational qualification' applies 45, issues of gender balance in the field of education reflect the picture world-wide. The **UNESCO** World Education Report for 2000 draws attention to the fact that the proportion of women who are teachers is increasing with 94 per cent in pre-school education, 58 per cent in primary and 47 per cent in secondary.<sup>46</sup>

There are fewer male teachers at both primary and secondary school levels in the UK then there were ten years ago. There is considerable concern about the fall in the proportion of men in primary schools and with the limited numbers of male students who are taking up primary education as a career.<sup>47</sup> The majority of males in teaching are among the older teachers, so that the proportion of women in the teaching professions is likely to increase

simply through natural attrition at retirement. Given this situation, it is understandable that in the recruitment of teachers, a high priority will be placed on the recruitment of male teachers whether from within the UK or from overseas. This in time leads to the depletion of the male teaching resource from countries also experiencing low numbers of male teachers in their teaching force.

In a study of 17 Commonwealth countries conducted at the request of Ministers of Education in a report tabled at the 16<sup>th</sup> Conference of Commonwealth Education Ministers in 2006, figures on teacher turnover in the UK reflect overall more male teachers leaving the school system than joining at primary level and that female teachers were replacing departing male teachers in the main. At secondary level 71 per cent of the teachers joining were female indicating a decline in males remaining in teacher posts even at this level.<sup>48</sup>

Case law in the European Union reflects the extent to which women have considered themselves to be at a disadvantage in comparison to their male colleagues where there employment status and condition is concerned (Bilka-Kaufhus Gmbh v Weber von Hartz (Case 170/84) 1980; Defrenne v Sabena (Case 43/75) 1976). Hence the vulnerability of the female teacher is further aggravated by the recognition that with the increasing feminisation of teaching, woman migrant teachers could be easy targets and placed at a position of some detriment, by unscrupulous recruiters.

This investigation revealed no obvious or apparent instance of direct discrimination to the male and/or female teachers on the grounds of gender. Whilst this was a surprise

<sup>43</sup> Commonwealth Teacher Recruitment Protocol, Article 3.12. Commonwealth Secretariat, 2004.

<sup>44</sup> Equal Pay Act 1970, Blackstone's Statutes on Employment Law (2003—2004), p. 2. OUP, UK.

<sup>45</sup> Sex Discrimination Act 1975, Blackstone's Statutes on Employment Law, p. 5. OUP, UK.

<sup>46</sup> In Status of Women Discussion Paper on 'World-wide Teacher Shortage'. UNESCO/ Education International, 2002.

<sup>47</sup> Hutchings M. (2002) in 'A representative profession? Gender issues'. IPPR, UK.

<sup>48</sup> R. Degazon-Johnson and Richard Bourne, Report on Future Actions requested by Ministers of Education in the Commonwealth Teacher Recruitment Protocol, p. 14. Commonwealth Secretariat, London.

finding and unanticipated, as related literature<sup>49</sup> suggests that the predominance of women in teaching may lead to those recruited being subjected to greater detriment than their male counterparts. However, no such evidence was unearthed. However, another form of discrimination was:

David, holding a Masters degree with 17 years teaching experience, when making efforts to find a permanent position, attended interviews and discovered that one job had been given to a white English teacher who was a recent graduate. Sonia, a science teacher with 18 years experience and the only black teacher in her school, discovered that the position for which she had been interviewed and made an offer in 2002, was given to a white American who had been hastily recruited by telephone in 2003.

The United Kingdom has sought to address and regulate the sensitive issue of racial discrimination in employment through the Race Relations Act 1976<sup>50</sup> and the CRE Code of Practice for the Elimination of Racial Discrimination and the Promotion of Equality and Opportunity in Employment<sup>51</sup> which aim to ensure that no job applicant or employee receives less favorable treatment than another on grounds of colour, race, nationality, or ethnic or national origin. Whilst previously unanticipated by this researcher until the interviews were held, it would not be extreme to propose that given the extent of less favourable treatment, abuse, detriment, harassment and victimisation experienced particularly in comparison to 'Aurora', the only teacher who was not recruited from overseas, 11 of the 12 teachers have all been subjected to forms of racial discrimination by their agencies and schools.

Part 2, Article 4. 1 of the Race Relations Act 1976 in addressing discrimination in employment states:

'It is unlawful for a person, in relation to employment by him ... in Great Britain, to

- discriminate against another in the arrangements he makes for the purpose of determining who should be offered employment
- (ii) in the terms on which he offers him that employment
- (iii) by refusing or deliberately omitting to offer him that employment.'52

Although the 'evidence' is limited to the cases of Sonia and David, Sylvester's method of reporting his treatment to the Race Relations Board in Newham and getting compensation for the less favourable treatment meted out to him, may well be the route that could have been successfully pursued by others. Ntombi's view that white South African teachers recruited to the United Kingdom appear to obtain permanent teaching positions, whereas Black South African teachers do not, is also pertinent.

The study concludes by offering a list of recommendations for action by recruiting countries, source countries and Commonwealth teachers themselves. I conclude this presentation by acknowledging again the tremendous contribution to the welfare of these teachers which was made by the National Union of Teachers of the United Kingdom, who are also conveners of the Commonwealth Teachers Group. I must also acknowledge the outstanding initiative of Commonwealth Ministers of Education who brought about the development and creation of the Commonwealth Teacher Recruitment Protocol for the protection of this critical human resource. I close by recommending that ministries of education, private school employers, trade unions and international organisations all participate in the task of ensuring full implementation of the Teacher Protocol, now acknowledged as an international instrument of good practice in migration and development.

<sup>49</sup> In Status of Women, Discussion paper on 'World-wide Teacher Shortage'. UNESCO/Education International (2002); and M. Hutchings (2002) in 'A representative profession? Gender issues'. IPPR, UK.

<sup>50</sup> Race Relations Act 1976, c. 74.

<sup>51</sup> CRE, Code of Practice for the Elimination of Racial Discrimination.

<sup>52</sup> Part 2, Article 4.1 (a), (b) abd (c) of the Race Relations Act 1976.

# **Appendix 4**

# **Seminar Programme**

# Arrival of overseas/foreign presenters and participants

7.00 pm Welcome dinner hosted by the Commonwealth Secretariat.

Day One	19 February	2008
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9.00 am Opening ceremony

Chair: Dr Roli Degazon-Johnson, Commonwealth Secretariat

Welcome and brief messages: Organização Nacional dos Professores, Education International UNESCO and Commonwealth Teachers Group representatives

Formal opening of symposium: Madam Maria Albertina da Conceição Bila,

Permanent Secretary, Ministry of Education and Culture, Mozambique

Keynote address: Professor Michael Kelly, SJ, Former Head of Education, University of Zambia and author of *Planning for Education in the Context of* 

**HIV/AIDS** 

10.30 am Coffe/tea break

11.00 am Session 1: Teacher Mobility, Gender and Status, I

Chair: Mr Richard Bourne, Institute of Commonwealth Studies, London

1. Teacher Supply, Recruitment and Retention in Six Sub-Saharan Anglophone

**Countries** 

Dennis Sinyolo, Co-ordinator, Education International

2. An Overview of Commonwealth Teacher Mobility, Recruitment and Migration

Dr Roli Degazon-Johnson, Education Adviser, Commonwealth Secretariat

Questions and discussion

12.30 pm Lunch

2.00—3.30 pm Session 2: Teacher Mobility, Gender and Status, II

Chair: Ms Samidha Garg, International Programmes Officer, National Union of Teachers, United Kingdom.

1. Migrant, Male and Married: Experiences of a Recruited Teacher in the European Union

Dr Paul Miller, University of London

2. Issues of Gender and Ethnicity in Commonwealth Teacher Recruitment and Migration — The Case of Twelve Teachers

Dr Roli Degazon-Johnson, Commonwealth Secretariat

Questions and discussion

3.30—4.00 pm Tea

4.00—5.00 pm Official book launch of Education International study, *Teacher Supply*,

\*\*Recruitment, and Retention in Six Anglophone Sub-Saharan African Countries\*\*

# DAY TWO February 20, 2008

9.00 am Session 3: The Impact of HIV/AIDS on Education and the Teaching Profession, I

Chair: Dennis Sinyolo, Education Co-ordinator, Education International

- 1. An Assessment of the Awareness of HIV/AIDS in the Educational Sector and the Needs of Teachers and Education Workers Living with HIV/AIDS in Ghana Helena Awurasa, EFAIDS Co-ordinator, Ghana National Association of Teachers
- 2. An Evaluation of the Prevention, Care and Treatment Access for South African Teachers Project

Lulama Nare, Head of Gender Department, South African Democratic Teachers Union

Observations and discussion

10.30 am Coffee/tea

11.00 am Session 4: The Impact of HIV/AIDS on Education and the Teaching Profession, II

Chair: Samidha Garg, International Programmes Officer , National Union of Teachers

- 1. Education for All and the HIV/AIDS Pandemic in Kenya Lucy Barimbui, EFAIDS Coordinator, Kenya National Union of Teachers
- 2. Teacher Supply, Retention and HIV/AIDS in the Caribbean Dr Paul Miller, University of London

12.30 pm Lunch **Session 5: Panel Discussion** 2.00 pm Chair: Richard Bourne, Senior Research Fellow, Institute of Commonwealth Studies, University of London Theme: From research findings to policy development: strategies for using research to improve education policies and programmes Panellists: Education International; Ghana National Union of Teachers; Organização Nacional dos Professores (ONP); Professor Michael Kelly, keynote speaker 3.00 pm Tea Overview: Summary, Conclusions and Recommendations Facilitator: Mr Richard Bourne, Senior Research Fellow, Institute of Commonwealth Studies, University of London 4.30 pm Conclusion **DAY THREE 21 February 2008** 9.00 am VISIT TO THE MATOLA TEACHER TRAINING INSTITUTE AND A MAPUTO PRIMARY SCHOOL ORGANISED BY THE MINISTRY OF EDUCATION AND CULTURE OF **MOZAMBIQUE** 12.30 pm Lunch 2.00 pm Press Conference on the Findings and Outcomes of the Symposium **Questions and Interviews** 3.00pm **Formal Close** 

Departure of overseas/foreign presenters and participants

**22 February 2008** 

**DAY FOUR** 

# **Appendix 5**

# **Symposium Participants**

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# GENDER, HIV/AIDS & THE STATUS OF TEACHERS

In February 2008 the Commonwealth Secretariat collaborated with Education International, the worldwide umbrella organisation of teachers' unions, to hold the third in a series of research symposiums. Researchers from Ghana, Jamaica, Kenya, Mozambique, South Africa, the United Kingdom and Zambia met in Maputo to address the most critical human resource for the achievement of education goals — the teacher. Under the theme of 'Gender, HIV/AIDS and the Status of Teachers' the symposium looked at the mobility of teachers and assessed the impact and effect of HIV/AIDS on education and the teaching profession.

This publication reports the fruits of their discussions, and their recommendations on these three key issues.





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