University of Alberta

Policy From Below: Foregrounding Teacher Experiences of Hardship in Remote Rural Secondary Schools in Kenya

by

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A thesis submitted to the Faculty of Graduate Studies and Research
in partial fulfillment of the requirements for the degree of

Doctor of Philosophy

in

Theoretical, Cultural, and International Studies in Education

Department of Educational Policy Studies

Dedication

To my loving parents Nungu wa Kioko and Kakuvi wa Nungu. In hindsight, I

now see where it was all going!

Abstract

Teacher shortage for schools in remote rural areas (also called hardship areas) in Kenya, as in other parts of the world, is a recurrent problem. Such shortage is problematic as it exacerbates the educational disadvantage of such areas, already disadvantaged with regard to access to schools, availability of teaching and learning resources, and educational outcomes. Various policy interventions meant to attract and retain teachers in the hardship areas have apparently not borne the desired results as teachers have continued to shun postings to schools in such areas. My contention is that the failure to find a lasting solution to the problem is mainly due to poor conceptualization, at the policy level, of the notion of "hardship" as it relates to the work of teachers in hardship areas owing to a top-down policy framework whereby the views and experiences of grassroots policy stakeholders are largely absent.

This qualitative study, utilizing interviews, document analysis, and researcher observation, entailed a critical interpretive analysis of what constitutes hardship by interrogating the lived experiences of teachers and other grassroots policy players in Makueni district, one of the foremost hardship areas in Kenya. The sample included teachers, school administrators, officials of the two teachers' unions, and two senior district education officials. All the participants were selected purposely because of their experiences that speak to key understandings of rural hardships that the study sought.

The findings showed a marked difference between policy and grassroots understandings of hardship. Key understandings of hardship included remoteness,

administrative hardships, weak students, distance from family, and bruised

professional pride. Suggested interventions included focused incentives, a holistic

conceptualization of hardship, real decentralization, and a participatory policy

process. The findings call for an inclusive policy framework, drawing, mainly, on

traditional African understandings of community and participative decision-

making, as a necessary starting point in the quest for a lasting solution to the

recurrent problem of teacher shortage in hardship areas.

Acknowledgements

I celebrate this project with my loving family–Mumbi, Neta, and Mwende–who have supported me immensely all through. To the wonderful participants who made this study a joy, I say athimwai muno.

I thank the Canadian Bureau for International Education for a generous four-year scholarship, and the University of Nairobi for granting me special leave to pursue and complete my studies.

Joe (Dr. José da Costa), my dear friend and supervisor, you believed in me even before we met. You made the whole process look easy. You are a wonderful mentor and scholar. *Asante sana* [thank you very much]. To my supervisory committee members, Dr. Ali Abdi and Dr. Lynette Shultz, thank you for your confidence in me. Your support and friendship have uplifted me greatly. You started me on a path. Together, we shall continue and complete the walk. To my examination committee members, Dr. Dip Kapoor, Dr, Terry Carson, and Dr. Tim Goddard, thank you for all the support.

Last, and by no means least, I thank, most deeply, my students and colleagues in Ikanga and Ikutha, where it all began. You spiked my thirst for more! Thank you.

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List of Abbreviations

BOG – Board of Governors

DEO – District Education Officer

DPM – Directorate of Personnel Management

EFA – Education for All

GoK – Government of Kenya

KUPPET – Kenya Union for Post Primary Education Teachers

KNUT – Kenya National Union of Teachers

MDGs – Millennium Development Goals

MoEST – Ministry of Education, Science and Technology

PPSRRB – Permanent Public Service Remuneration Review Board

PTA – Parents Teachers Association

TSC – Teachers Service Commission

TSRC – Teachers Service Remuneration Committee

UNICEF – United Nations Children's Education Fund

UPE – Universal Primary Education

Chapter 1

The Beginnings

The old bus, dangerously over packed, stuffy, squeaky, and all, took off with pomp and fanfare. The cacophony of noises from hawkers, touts, chicken – yes, there were chicken on the bus – wailing babies, and distraught mothers, fused into a bizarre concerto that, added to the strained revving of the bus engine, marked our departure from the bus terminus in Kitui. Music blared loudly from some unseen speakers as the bus, with touts hanging precariously from the luggage rack, took off. The twisting, narrow, bumpy, and dusty road did not help matters. My seatmate, an old and extremely affable man, offered me a banana, and later a piece of sugar cane, both of which I politely declined. Apparently not easily deterred, the old man engaged me in a lengthy discussion that, in the process, had me retrace and recount my family history and kinship ties. Meanwhile, the bus made tortured progress on the dusty earth road as we journeyed along the 100-kilometre ride to Ikanga, a small rural village in South-Eastern Kenya.

My decision to accept the offer from the Teachers Service Commission (TSC), the employer of teachers for public schools in Kenya, to teach in a remote rural school came as a surprise to many of my friends and university classmates. Back then, in the late 1980's, teachers with university degrees were not very many in Kenya and one could have easily negotiated for a posting to a school of their choice. My friends could therefore not understand why I so readily accepted to go to work in the "bush". My argument, however, was that the "bush" equally

needed good teachers and, anyway, I was only going to try it for a term. Little did I know that I would be working and living in that "bush" for five years, an experience that has had a lasting impression on my career path.

Back on the bus, the driver, his crew, and the passengers were a study in patience. The bus would stop at every shopping centre, whether or not anyone was alighting or boarding and the crew would disembark and smoke leisurely as they chatted with the shopkeepers and hawkers. Nobody on the bus seemed to find this strange and time wasting! What I thought would have been a one-hour ride took us four long dusty hours!

Thus, tired, thirsty, and dusty, but enthusiastic to launch a career, I made my entrance into my future. A small, sleepy market with less than 20 shops greeted me. This was going to be my new home! A broken and tired-looking signpost on the roadside directed me to my new school. Putting a spring into my step, I followed the twisting dusty path to my future workstation.

In its entirety, the school comprised an L-shaped block of four shutters-less classes and a tiny room at the centre with the inscription "Principal's Office" on a copper doorplate. I walked into the tiny room. A simple table, two wooden chairs and an old metal filing cabinet were all the office furniture in evidence. A worn out world map adorned the wall behind the principal's desk. I introduced myself to the head teacher, a pleasant man who welcomed me, had me sign the visitor's book, and asked me to feel at home! Thus began the journey of my life as an educator, and my interaction with hardship areas in Kenya.

Introduction

Attracting and retaining teachers for schools in remote rural areas has been a concern for researchers, and a recurring challenge for education authorities all over the world. In recent years, there has been considerable research addressing the issue throughout the world (Barker & Beckner, 1987; Cobbold, 2006; Collins, 1999; Garman & Alkire, 1992; Sargent & Hannum, 2005; Yarrow, Ballantyne, Hansford, Herschell, & Millwater, 1999). Reasons why teachers shun postings to remote rural schools include, among others, isolation (Inverarity, 1984), inadequate shopping and weather (Murphy & Angelski, 1996), as well as perceived health risks (Towse, Kent, Osaki & Kirua, 2002). Governments and education authorities have tried various policy measures, ranging from persuasion to coercion, in an attempt to address the problem. Such measures include salary bonuses, free housing, forced postings and transfer, and hardship allowances (Cobbold, 2006; McEwan, 1999).

Concern for attracting and retaining teachers in remote rural schools is a result of the shared commitment by world governments to the provision of equitable education services across all contexts. A common ground is the desire by all education systems to have adequate highly qualified teachers in the schools. Common sense and research both tell us that a high quality teaching force is the basis of a successful educational system and that good teachers are the single most important variable in student achievement (Buchmann & Hannum, 2001; Darling-Hammond, 1999). For many third world countries, however, the

availability of teachers in adequate numbers and their equitable distribution to schools is a perennial challenge for education authorities.

Kenya, like many countries in the world, is committed to the provision of equitable education services. To this end, the country is a signatory to various international protocols relating to equity in the provision of education. Such protocols include, among others, the 1990 (Jomtien) and 2000 (Dakar) declarations on Education for All (EFA) and, more lately, the Millennium Development Goals (MDG's). These protocols enjoined the world community to achieve universal primary education (UPE) and to eliminate gender disparities in primary and secondary education preferably by 2005, and at all levels by 2015 (Ministry of Education, Science and Technology [MoEST], 2004). In addition, the government of Kenya has launched Vision 2030, a strategic initiative which aims at "making Kenya a newly industrializing, middle income country providing high quality life for all its citizens by the year 2030" (Republic of Kenya, 2007, p. 2). Education is one of the key pillars of this vision and in this regard, the government is aiming at recruiting more than 28,000 teachers and ensuring that all schools have adequate teachers. In light of these commitments, teacher management, particularly equitable distribution of teachers, becomes an increasingly important policy area.

Unfortunately, educational inequalities relating to access to schools, availability of teachers, availability of teaching and learning resources, and educational outcomes exist throughout the different regions (districts and provinces) in the country (Bray, Clarke, & Stephens, 1986; Sifuna, 1990). Such

imbalances raise pertinent questions relating to equity and social justice, and undermine the integrative role of education. Teacher shortage has been particularly a recurrent problem in Kenya. Current estimates by the Teachers Service Commission (TSC) show that secondary schools in Kenya have a shortage of 23, 291 teachers (TSC, 2008). The shortage is more severe in schools in the so-called hardship areas. These are high-poverty, remote, geographically isolated rural areas with harsh climatic conditions and poor infrastructure. For instance, while the teacher-student ratio in Kenya was 1:44 in 2005 (Government of Kenya [GoK], 2006), for schools in the arid and semi-arid areas it was as high as 1:100 (UNICEF, 2005). Teachers for both primary and secondary schools are not keen to take up postings in these hardship areas (Otieno, 2010). A more pressing problem, as is the case in similar areas elsewhere in the world (Lunn, 1997), is the retention of teachers. A major concern for policy makers, in this regard, has been how to effectively attract and retain teachers in rural and remote schools.

Granted, the government has made some efforts over the years to attract and retain teachers in the hardship areas. Notably, the government has appointed numerous committees and commissions to advise on appropriate policy measures. Some of the policies implemented have included, initially, a paltry hardship allowance with a component to purchase a refrigerator and a bicycle. There was also the quasi-coercive rider in all appointment letters for teachers that accepting the appointment to be a teacher implied willingness to serve in any part of the country. Later, beginning in 1994, the government increased the hardship

allowance to 30% of the teachers' gross salary. More recently, from 2003, the government decentralized the recruitment of secondary school teachers, giving school Boards of Governors (BOGs) the mandate to hire teachers. This was a policy initiative aimed at ensuring teacher retention, on the assumption that teachers would be willing to remain at the schools of their own choice. So far, there has been no research to interrogate these policy initiatives and to establish whether they have been effective.

In the rest of this chapter, I discuss the statement of the research problem, the purpose of the study, and the significance of the study.

Statement of the Research Problem

The continued shortage of teachers for schools in hardship areas in Kenya is a problem that raises concerns regarding the staffing of schools in hardship areas in Kenya, and more broadly, the government's commitment to equalize educational opportunity for all the citizens. Such shortage exacerbates the educational disadvantage for students in such regions, already disadvantaged with regard to access to schools, availability of learning resources, and educational outcomes. This is an untenable position, furthermore, given that most of these hardship areas are also poor and bereft of any viable economic resources, making education the only avenue for social mobility for the students and their families. Moreover, the various policy interventions to attract and retain teachers in the schools in such areas have apparently not borne the desired results as teachers have continued to shun postings to such schools.

My contention is that the continued inability to find lasting policy solutions to the problem of teacher shortage in the hardship areas is largely due to failure by the policy makers to accurately conceptualize and define what constitutes hardship. This is largely due to an exclusionary, top-down policy process informed by selective, predominantly urban, understandings of ruralness and the attendant problems of working in such environments. Such understandings of ruralness have little input, if any, from grassroots policy stakeholders.

Such an elitist policy approach is symptomatic of the general malaise of weak governance structures in most of sub-Saharan Africa that, as Abdi, Ellis, and Shizha (2005) suggest, underscores the ineptitude of the political elite. Moreover, as Abrahamsen (2000) correctly points out, governance structures in Africa are hardly ever accountable to the poor and lowly.

The missing link, in my opinion, and the object of this study, is what Long (1992; 2002) calls the actor perspective – an expansive understanding of the working and living conditions of teachers in rural remote schools based, more so, on the experiences of the teachers and other grassroots policy stakeholders. An examination of the policy measures in place is also necessary, and particularly relating to the views of target beneficiaries of the said policy measures, the teachers.

Even though experiential knowledge is seen as impressionist and ideological, and generally lacking in quantifiable aspects, thus less legitimate in informing policy (McGee, 2004), I argue, together with McGee and Brock (2001),

that policy knowledge produced from above, using data from statistical surveys, equally carries considerable ideological baggage. Moreover, as Gaventa points out, "policy-making is not a linear process which can be imposed from above by a technical fix...questions must be raised about who participates, with what forms of knowledge, and in whose spaces..." (2004, p. 276).

Purpose of the Study

This study, therefore, aimed at an in-depth examination of what constitutes hardship as it relates to teaching in remote rural schools in Kenya. The study interrogated the lived experiences and understandings of hardship by rural teachers and other grassroots policy players including school administrators, officials of teachers' unions, and local education officials. The study also examined the measures in place for attracting and retaining teachers in hardship areas. As well, the study sought the views of the participants regarding the said policy measures. Finally, the study sought suggestions on effective policy interventions for attracting and retaining teachers in hardship areas.

Research Questions

The following questions guided the study:

1. a) How do teachers experience working and living in a rural secondary school in a hardship area?

   b) What are the experiences and views of other grassroots policy stakeholders (e.g., school administrators, teachers' union officials, and education officials) relating to the work of teachers in hardship areas?

2. a) What policy measures are in place to attract and retain teachers in the

hardship areas?

   b) What are the views of the teachers and other stakeholders regarding these

measures?

3. What policy recommendations and program changes are needed to attract retain

teachers in hardship areas in Kenya?

Significance of the Study

The findings of this study should be useful to a number of stakeholders.

First, in Kenya, policy planners at the TSC, the Directorate of Personnel

Management (DPM), and the Ministry of Education may find the study instructive

with regard to key issues that need addressing in order to stem the perennial

problem of teacher shortage in the hardship areas.

From a policy analysis perspective, the findings should provoke

conversations aimed at improved policy formulation. In this regard, the findings

invite deeper policy engagement entailing, I hope, more inclusive and

participatory policy processes. More specifically, the experiences and views of

teachers and other grassroots policy players regarding the working conditions in

the hardship areas, and regarding the measures to attract and retain teachers in

such areas should inform better policy with regard to the management of teachers

in hardship areas particularly relating to recruitment, posting, transfer, and the

administration of incentives.

At the level of practice, the findings should also be of interest to school

administrators including principals, BOGs, as well as Parents Teachers

Associations (PTAs) especially regarding concerns by the teachers that are within the mandate and ability of such administrators. Teachers' unions, too, will find the study relevant as the findings could form the basis for their quest for better incentives and improved working conditions for their members generally, and in particular those working in hardship areas.

Beyond Kenya, policy makers and practitioners may find this study helpful in informing policy and practice relating to staffing remote rural schools. Lastly, the findings of the study could contribute to the literature on attracting and retaining teachers for schools in remote rural settings. The findings should be of particular interest to educational comparatists who could use the findings for cross-national studies.

The rest of this dissertation is as follows: Chapter 2 is a review of the literature as well as the rationale for the study. In chapter 3, I discuss the methodology of the study, including details on the study site, sampling, data collection, and data analysis. In chapter 4, I present the findings of the study and discuss those findings in chapter 5. Chapter 6 entails an overview of the study, conclusions, and recommendations. Finally, chapter 7 includes personal reflections.

Chapter 2

Review of Literature

In my younger days, in rural Eastern Kenya, hunting was a valued activity for young men. We did not hunt for sport, no! We hunted for food. Dik-diks, antelopes, and rabbits were still plentiful and their delicious meat routinely found its way to our family meals. We quickly learnt that one did not get the finer points on hunting from the experience only, but also from the fireside in the evenings, listening to the seasoned hunters as they discussed and debated their experiences, and reminisced about the exploits of heroic hunters of the past. From these stories, moreover, one also learnt about the problems encountered by these famed hunters as well as their weaknesses. Such stories therefore helped one to form a mental map of where to hunt, how to set traps, and how to track wild game. Such knowledge, pooled in the repository of the collective community memory and passed on from generation to generation, was foundational to planning a good hunt.

The above vignette is analogous, in part, to the place of literature review in research. The purpose of a literature review, broadly stated, is to situate a study within "a tradition of inquiry and a context of related studies" (Marshall & Rossman, 2006, p. 43). Moreover, the review helps to identify gaps in previous research and thus provides a rationale and focus for the study (Anderson, 1990; Marshall & Rossman, 2006). In this chapter, I will review literature relevant to this study. The literature will cover the two broad themes of the study, namely, 1) challenges to attracting and retaining teachers in schools in remote rural areas in

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both developed and less developed countries, and 2) policy initiatives relating to teacher recruitment and retention for remote rural schools.

Before examining the literature on the two themes, however, I will first explore some literature on the theoretical frameworks that informed this study, namely, motivation theory and participation theory.

Theoretical Frameworks

Theoretical perspectives on employee motivation.

In addressing the question on attracting and retaining teachers in remote rural schools, one has to, inevitably, address issue of employee motivation. It would be important to understand the factors, job-related and otherwise, that may lead to teacher satisfaction or dissatisfaction in remote rural schools. In this regard, therefore, an examination of motivation theories is necessary.

Studies of employee motivation and job satisfaction have adopted various theoretical models. Many of these models draw on the ideas of the classic motivation theorists who "supported the notion that individuals have an inherent need for a work life that they believe is meaningful" (Chalofsky & Krishna, 2009, p. 189). These theorists (e.g., Alderfer, 1972; Herzberg, 1966; Herzberg, Mausner, & Snyderman, 1959; Maslow, 1970) popularized the so-called need or content theories which focus on the individual and the meaning or purpose that they attach to their work. More importantly, the principal aim of the content theories was to identify the factors associated with motivation (Steers, Mowday, & Shapiro, 2004). In the section below, I will discuss the needs theory models of Maslow (1970) and Herzberg (1966; Herzberg, Mausner, & Snyderman, 1959).

At the end of the section, I will discuss the more holistic approach to human needs models advanced by Kamenetzky (1992) and Max-Neef (1992).

Maslow's hierarchy of needs model.

Many studies on employee motivation and satisfaction draw from Maslow's (1970) hierarchy of needs theory. The theory postulates that need to satisfy a hierarchy of biological and social needs and drives is what motivates human behaviour. These needs include physiological, safety and security, belongingness, esteem, and self-actualization. The central argument of this theory is that the satisfaction of one set of needs progressively gives rise to a higher order set of needs.

According to Maslow (1970), the first three needs are deficiency needs that must be satisfied before moving on to satisfy the last two, which are growth needs that relate to individual achievement and the development of human potential. Alderfer (1972) later adapted this model and compressed it to encompass only three needs: existence, relatedness, and growth. McClelland (1971, 1975) furthered this work but argued that human beings possess several, often competing, distinct and clearly defined needs that are not necessarily hierarchical. Such needs include achievement, affiliation, power, and autonomy.

Scholars have criticized Maslow's needs theory as being too abstract especially with regard to the notion of self-actualization (Steers, Mowday, & Shapiro, 2004). Wahba and Bridwell (1976), for example, state that the most problematic aspect of Maslow's theory is the concept of need itself in that human behaviour is not necessarily related to the satisfaction of needs. Nevertheless, they

acknowledge that Maslow's notions of gratification and two-level hierarchy received support from the available research findings. In recent organizational management literature, Maslow's theory has found support. According to Chalofsky and Krishna (2009), many employees today, especially the "baby boomers" nearing retirement age, as well as their children, Generations X and Y, are questioning the meaning and purpose of their work and their lives (p. 189). Maslow's needs theory supports the notion that human beings have need for work that is meaningful. Indeed, Maslow (1970) argues that people who do not perceive their work, and work place, as being meaningful will not work to their full capacity. Maslow (1970) further explained the higher order needs of esteem and self-actualization expressed value needs, which he referred to as "being" values (B-values). These B-values include justice, richness, goodness, truth, uniqueness, aliveness, transcendence, and meaningfulness. In the final years of his life, Maslow developed what he called "Theory Z", after McGregor's (1960) "Theories X and Y", to describe people who transcend self-actualization. He described such people as being "involved in a cause outside of their skin: in something outside of themselves - some calling or vocation in the old sense, the priestly sense" (p. 43). These being (B) values are intrinsic and cannot be reduced to anything more ultimate.

   Herzberg's motivation-hygiene theory.

   While Maslow (1970), Alderfer (1972), and McClelland (1971, 1975) focused on individual differences and their role on motivation, Herzberg (1966; 1968; Herzberg, Mausner, & Snyderman, 1959) was interested in how the nature

of one's job influences motivation and performance. Herzberg's motivation - hygiene theory, also called the two-factor content theory, states that one distinct set of factors (needs/drives) is associated with job satisfaction and another separate set of factors is associated with job dissatisfaction. The factors associated with satisfaction, also known as motivators, include achievement, advancement, responsibility, recognition and the work itself. Motivators lead to satisfaction because of the need for growth and a sense of self-achievement. They contribute to satisfaction towards the worker's need for self-actualization.

The factors associated with dissatisfaction, also known as dissatisfiers or hygiene factors include salary, job security, working conditions, quality of management, organizational policy, administration, and interpersonal relations. These factors are associated with the job but are not directly part of it. They are called hygiene factors because they can be avoided or prevented by the use of "hygienic" administrative processes.

An interesting aspect of this theory is in the dynamics of the motivators and hygiene factors. While motivators, on the one hand, may lead to job satisfaction, their absence will not necessarily lead to dissatisfaction. On the other hand, hygiene factors can potentially lead to dissatisfaction but their absence will not necessarily lead to satisfaction. If, for example, a teacher earns praise from the school principal for a job well done, such recognition can cause satisfaction. However, lack of such recognition will not necessarily cause dissatisfaction. On the other hand, while disruption of the water supply in the washrooms may make the teachers dissatisfied, a regular uninterrupted supply of water will not

necessarily lead to satisfaction. The most important part of the theory is that the main motivating factor in a job is not in the environment but in the job's intrinsic value and satisfaction gained from the job. Therefore, to motivate an individual, the job must be challenging, provide room for enrichment, and be of interest to the jobholder. This, therefore, calls for prioritization of the motivators. All too often, the absence of motivators leads to over concentration on hygiene factors, which are the negative factors. Unfortunately, the hygiene factors are visible and are, therefore, a constant source for complaints.

While agreeing that Herzberg's theory offers an important lens for understanding job satisfaction, Kalleberg (1977) points out that it raises some theoretical problems that constrain its usefulness for a thorough understanding of job satisfaction. Kalleberg (1977) in particular faults Herzberg's theory's failure to "consider individual differences in the satisfactions experienced by people with the same job characteristics" (p. 125). Such differences are not only due to the way different people view the job, but also due to the differences in what people seek to obtain from the job. Thus, Kalleberg (1977) argues that a study of job satisfaction must include an examination of the jobholder's value system. Kalleberg suggests that an initial step should be to examine the value systems that employees bring into their jobs. These value systems are dependent on socialization and life experiences before employment, non-work social roles, and work experiences. An understanding of these factors is therefore crucial for the examination of the different mechanisms for enhancing employee satisfaction.

A holistic view of human needs.

The theorizing on human needs expounded in the content theories of Maslow (1970) and Herzberg (1966) is problematic on two levels. First, these theories conceptualize human needs in deficiency terms. Kamenetzky (1992) and Max-Neef (1992) point out that, besides being deprivations, human needs are also potentials. Such a view opens up opportunities for human beings to influence the satisfaction of their needs, and not just wait for an outside agency to satisfy those needs. Second, the content theories focus solely on the relations between the employee and the job situation. What they fail to unpack are the politics of the work environment, the power relations, and the attendant tensions that these dynamics bring to bear upon employee motivation and their sense of job satisfaction. Indeed, Herzberg, Mausner, and Snyderman (1959) posit that the environment external to the job is not an important factor in job satisfaction. Kamenetzky (1992) and Max-Neef (1992) argue for an examination of the historical and systemic factors that give rise to the needs in the first place. Below I discuss the understandings of human needs by Kamenetzky and Max-Neef.

Mario Kamenetzky.

Kamenetzky (1992) perceives human needs as ontological facts. As such, "they are the most potent source of human motivation" (p. 181). He argues that human needs are at different levels but these are not necessarily hierarchical. These levels are body, mind, and society.

At the body level are biological needs, which are foundational to human survival. Such needs are sleep, food, and sex, among others. At the intersection

between body and mind are bio-psychological needs. These needs, which stem from physical requirements and are linked to satisfaction of mental requirements, include needs like clothes and houses. At the level of the mind are psychological needs such as the need for knowledge and spiritual well-being. The satisfaction of these needs leads to relaxation from the pressures exerted by the quest to satisfy biological needs. At the society level are socio-cultural needs. These can only be satisfied through interaction with others. Such are needs like participation, communication, and autonomy.

For Kamenetzky (1992), the satisfaction of the human needs requires an expanded consciousness. Self-expression, as opposed to taking directives, following laws imposed from above, and sticking to norms, is an important element in this endeavour. As such, participation is a necessary ingredient in any scheme aimed at satisfying human needs. Kamenetzky thus advocates for thinking which provides for "activities in which investment of human energy yields a direct satisfaction of needs" (1992, p. 188).

Manfred Max-Neef.

Like Kamenetzky (1992), Max-Neef (1992) advocates for a more holistic view of human needs. An immediate concern to him is that the earlier conceptualizing of human needs, particularly following Maslow's (1970) hierarchy of human needs, viewed the human being as an "object-person" – one whose needs could be met without the necessary participation of the individual. Max-Neef proposes a transformation to a thinking that views the individual as a "subject-person" (p. 198). Moreover, Max-Neef (1992) argues that human needs

are complex and need to be "seen as a system, the dynamics of which does not obey hierarchical linearities" (p. 211).

Max-Neef (1992) classifies human needs into existential and axiological categories. Under the existential category are needs such as Being, Having, Doing, and Interacting. Under the axiological category are needs such as Subsistence, Protection, Affection, Understanding, Participation, Leisure, Creation, Identity, and Freedom. The different needs call for different satisfiers. Like Kamenetzky (1992), Max-Neef views human needs as both a deprivation and a potential. This is a view that underscores the importance of unleashing the capacity of individuals to work towards the satisfaction of their needs. Below is a table illustrating Max-Neef's idea of needs and their corresponding satisfiers:

Table 2.1 *Matrix of Needs and Satisfiers* (adapted from Max-Neef (1992)

Needs according to axiological categories	Needs according to existential categories			
	Being	Having	Doing	Interacting
Subsistence	Physical health, equilibrium, sense of humour, adaptability	Food, shelter, work	Feed, procreate, rest, work	Living environment, social setting
Affection	Self-esteem, solidarity, passion	Friendships, family, partnerships	Make love, caress	Express emotions, share
Understanding	Critical conscience, curiosity, rationality	Literature, teachers, educational policies	Investigate, study, experiment	Settings of formative interactions, schools, family
Participation	Adaptability, solidarity	Rights, duties	Become affiliated, share, obey, dissent	Settings of participative interaction, parties, associations
Leisure	Curiosity, receptiveness	Games, spectacles, clubs	Day-dream, brood, recall old times	Privacy, intimacy, spaces of closeness
Creation	Passion, determination, intuition	Abilities, skills, work	Work, invent, build	Productive and feedback settings, workshops, cultural groups
Identity	Sense of belonging, self-esteem, assertiveness	Symbols, language, religions, habits	Commit oneself, integrate oneself, confront	Social rhythms, everyday settings
Freedom	Autonomy, self esteem, tolerance	Equal rights	Dissent, choose, run risks	Temporal/ spatial plasticity

An important aspect of this holistic conceptualization of human needs by Kamenetzky (1992) and Max-Neef (1992) is that it foregrounds both the historical and systemic factors that give rise to the needs in the first place. Examination of such historical and systemic factors, therefore, is a necessary step in the quest to satisfy human needs.

The transformation from an object-person to a subject-person which both Kamenetzky (1992) and Max-Neef (1992) advocate, and which calls for the participation of individuals, can only be actualized in localized small-scale settings. Max-Neef (1992) points out that "there is no possibility for the active participation of people in gigantic systems which are hierarchically organized, where decisions flow from the top to the bottom" (p. 198). This calls for a form of direct participatory democracy, which encourages creative solutions flowing from the bottom upwards (Max-Neef, 1992).

Participation theory.

The related concepts of participation and inclusiveness in organizational policy processes are at the root of the thinking behind this study. There are multiple parties interested in the issue of teacher management in Kenya, and particularly with regard to the staffing of schools in remote rural areas. Such interested parties include, among others, government, teachers' unions, school management boards, teachers, parents, and local communities. A good understanding of participation theory is therefore necessary for interrogating the relationships and interactions between all these policy players. Participation and participatory decision-making are, for me, especially important given my

upbringing in a rural Kenyan community where engaged participation defined relationships, interactions, and activities within the family and the community. I will discuss participation theory from three perspectives, namely, participation in traditional African epistemology, participation in modern Western thought system, and participation in organizational management theory.

Participation in traditional African philosophy.

In traditional (meaning, for purposes of this discussion, pre-colonial) African communities, deliberative democracy, or versions of it, was common and entailed participatory governance structures. Many scholars of African traditional political thought (e.g., Abdi, 2008; Masolo, 2004; Rodney, 1981; Wiredu, 2004) aver that communities in traditional Africa practiced what Wamala (2004) calls government by consensus. Whether at family or community level, members deliberated issues, often under a tree, until they reached consensus. Such dedication to consensus proceeded from the epistemological belief that knowledge is both dialogical and social, and in the valuing of collective responsibility for the welfare of the community (Mbiti, 1990).

The community, as such, is at the root of all knowledge and political action in traditional African communities. Thus, participation is tied to this notion of the primacy of the community over the individual. The community defines the concept of being, and indeed the whole notion of personhood cannot be conceived outside of community. Togetherness, which is the highest African indigenous value, is the fabric that holds the community together (Teffo, 2004). Togetherness informs the African sense of material, space, and time. One does not go hungry

when there are fruits on the neighbour's orange tree, one does not lack fire in the morning when you can run to the neighbours and get some burning embers. Mbiti (1990) captures this strong sense of community most aptly with the dictum "I am because we are; and since we are, therefore I am" (p. 108). This, he argues, means that to the African to be is to belong to a community. Among my community, the Akamba (which is also Mbiti's community), the saying *mundu nandu* (a person only exists in relation to a community) is at the root of this thinking. The community provides the integrated cultural whole to which individual members stand in dialogical relationship. The community supplies the interactive context in, and through, which individuals can actualize their identities. Indeed, the community is the knowing being (Hamminga, 2005). This contrasts sharply with Rene Descartes' (1637) *cogito ergo sum* (I think, therefore I am) which is at the heart of modern Western worldviews. In African epistemology, knowledge emanates from the community; and passes on from the ancestors to the elders and to the community. Hamminga (2005), using the analogy of a tree, describes this flow clearly. He says, "Our community is a tree. (Dead) ancestors are roots giving energy to the trunk, the adults, who in turn supply the branches, leaves and flowers, our children. The tree knows. We know; the tree is the knowing subject" (pp. 57-58). Thus knowledge is a flow, it is variously located within the tree; it is a rhythm, a vital force that links the whole community. That is why knowledge (thinking) has to be shared and not privatized. All these dynamics underscore the participative nature of life in traditional African communities. Such participation, moreover, is not limited or confined to the living but extends to include both the

dead and the yet to be born. Furthermore, it encompasses both the animate and the inanimate universe.

Participatory decision-making thus proceeds from this shared belief in the primacy of the community as the source of all knowledge, and on the dialogical nature of knowledge. The following Buganda proverbs highlight the value of consultation:

1. *Magezi muliro, bwegukuggwako, ogunona wa munno* (Knowledge is like firewood in the hearth, if you have none you fetch it from your neighbour).

2. *Ndi mugezi nga muburile* (I am wise, only if others have informed you)

3. *Magezi gomu, galesa Magambo ku kubo* (Belief in his intellectual self-sufficiency resulted in Magambo's failure to reach home/Magambo, a blind man, failed to reach home because of his arrogance and unwillingness to consult others). (Wamala, 2004, p. 438)

Some scholars, including some eminent African scholars, have loudly criticized the idea that traditional African societies were democratic and that the whole notion of consensus in decision-making is an overplayed idealization of pre-colonial Africa. Simiyu (1987), for example, in his essay, "The democratic myth in traditional African societies", argues that ascribing deliberative processes to policy-making in traditional African communities posits a unanimity that actually was not there. He sees this as an idealization of the past, which obscures serious conflicts that African communities endured before the advent of colonialism. Simiyu's position, however, betrays a pervasive misunderstanding of

consensus as the absence of dissensus. Deliberating until they achieved consensus

included, as a matter of course, various dissenting views and positions. This is a

foundational tenet of democratic governance which Abdi (2008) points at when

he argues thus:

> It should be understood that regardless of what territorial chances people
>
> lived through, a salient feature in the course of human development should
>
> be the tendency to create and selectively maintain socio-political
>
> environments where different actors negotiate their interests, expectations,
>
> and even beliefs. (p. 155)

What did not happen at the policy meetings in traditional African

communities was imposition or subjugation of certain viewpoints arising from

differentials in hierarchy or disproportionate access to social capital. Even then,

the elaborate and intricate kinship system, where everybody was in a way related

to everybody else either through blood or marriage relations, preempted the

possibility of exploitative relationships (Wamala, 2004). Moreover, participative

governance through consensus ensured that the views of all, and not just the

majority or the powerful, were valued.

Indeed, even in those communities that had centralized political systems,

complete with monarchies, the power of the king stemmed from the people. Teffo

(2004, p. 246) cites a famous Zulu saying "*Kgosi ke kgosi ka batho* (a chief is a

chief through the people)" to underscore the fact that one cannot be king without

the will and support of the people. In such communities, the chief or king had a

council of elders that was responsible for policy. The monarch did not impose his

will on the council or on the people. Among the Kikuyu and Ameru of Kenya, such councils of elders, Kiama and Nchuri Ncheke respectively, worked by consensus. This means that they literally engaged in deliberation until they arrived at a consensus. This is what made the system cooperative rather than adversarial. Decisions emanated from, and belonged to, all the members of the council and not the king or chief. Indeed any king who took lightly or tried to trifle with council decisions was liable to lose his throne. Gyekye (1988) underscores the argument thus:

> It appears the most important injunction was that the chief should never ever act without the advice and full concurrence of his councilors, the representatives of the people. Acting without the concurrence and advice of his Council was a legitimate cause for his deposition. Thus, the chief was bound by law to rule with the consent of the people. (p. 11)

However, the participatory nature of decision-making in traditional African communities did not discount the contribution of experts and wise people. Experts such as warriors, medicine men and women, prophets, diviners, rainmakers, blacksmiths, and even Odera Oruka's (1990) sage philosophers, made their expert contributions to the collective wisdom of the community. As in the case of the monarchs, these experts and wise people, too, did not have monopoly over knowledge and opinion. As the Baganda would say (Wamala, 2004, p. 438), "*Omuwesi ekyamuzimbya kukubo kulagirirwa*" (the reason a blacksmith locates his workshop by the roadside is to have access to the views of others). This means that the experts, too, had to consult with other people.

In contemporary times, this participatory nature of decision-making and governance informed by traditional African epistemological and ontological thought has found expression in government and political processes in some parts of Africa. In Rwanda and Burundi, for example, following the 1994 genocide, and the protracted Hutu and Tutsi animosities that precipitated the genocide, the two countries resorted to citizen driven community judicial and reconciliation mechanisms (Diallo, 2006). Rwanda adopted the *Gacaca* community court process to deal with the perpetrators of the genocide while in Burundi the government has resorted to *Bashingantahe*, a community mediation process, to heal the wounds caused by the war. According to Diallo (2006), both the *Gacaca* and the *Bashingantahe* are "community management tools for dealing with conflicts and involved processes such as conflict resolution, mediation and reconciliation" (p. 1).

Participation in modern Western thought system.

Different streams and thinkers have contributed to the thinking on participation in Western political and epistemological contexts especially in the post-Second World War period. Participatory action research, social anthropology, and various strands of post-modern scholarship have all contributed to this thinking (Chambers, 1998). Jürgen Habermas is one of the foremost interdisciplinary theorists whose ideas relating to the right of individuals to participate in public affairs resonate, to an extent, with the general tenor of this study. In this regard, Habermas' concept of discursive participation within a deliberative public sphere is especially relevant.

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Habermas and the discursive public sphere.

Habermas first advanced the idea of public sphere in his book *The Structural Transformation of the Public Sphere*: *An Investigation of a Category of Bourgeois Society* (1962/1989). Habermas conceived of the public sphere as a democratic discursive space where members of the public interact and participate as equals in discussing issues of common interest. This idea is historically built upon the emergence of what Finlayson (2005) called "reasoning public" (p. 10) within the public spaces (e.g., coffee houses, salons, and literary journals) following the declaration of civic rights guaranteeing individuals the freedom of association and expression in 18th century Europe.

Ideally, the idea of public sphere connotes unrestricted public participation in the discussion of public matters (Fraser, 1990). According to Habermas, the public sphere is a space that epitomizes the virtues of inclusiveness, participation, openness, equality, and freedom. Indeed, to Habermas, the "political public sphere is the fundamental concept of a theory of democracy" (1992, p. 446).

The Habermasian public sphere is a "linguistically constituted public space" (Habermas, 1996, p. 361) entailing a "network for communicating information and points of view [which are]…filtered and synthesized in such a way that they coalesce into bundles of topically specified public opinions" (p. 360). The discursive aspect is thus the essential defining characteristic of the public sphere. Thus defined, the public sphere is, therefore, variously located. It refers to any public space, not just a single, national-level political discourse (Jacobson & Storey, 2004). It thus operates at village, regional, and national

levels, as well as globally. Jacobson and Storey (2004) further argue that "efforts to strengthen democratic processes at both the local and national levels can be analyzed using the concept of the public sphere" (p. 102). Indeed, Habermas took this further when he posited that "every encounter in which actors do not just observe each other but take a second-person attitude, reciprocally attributing communicative freedom to each other, unfolds in a linguistically constituted public space" (1996, p. 361).

For Habermas, therefore, the focus on participation is not on the intricacies of actual policy formulation or the complexities of administrative minutiae but on the discursive processes that serve as the background to democratic policy-making. This is primarily the domain of informal deliberative public spaces where opinion formation is "uncoupled from decisions... [and] effected in an open and inclusive network of overlapping, subcultural publics having fluid temporal, social and substantive boundaries" (Kulynych, 1997 p. 321). With this position, Habermas (1996) seems to trust that the public deliberations will generate enough influence to ensure that public policy decisions reflect the consensus emerging from such deliberations. He further points out that "within the boundaries of the public sphere or at least of a liberal public sphere, actors can acquire only influence, not political power...not influence per se, but influence transformed into communicative power legitimates political decisions" (1996, p. 371). Habermas's contention is that power-holders who fail to respect such consensus will face a legitimation crisis.

Scholars (e.g., Fraser, 1990) have criticized Habermas's idea of discursive

participation for being too abstract and not attending adequately to the structures

of power in society. The main criticism has been that in his conceptualization of a

communicative structure that is equitable and inclusive, Habermas does not pay

adequate attention to the power differentials between different individuals and

groups in society and the extent to which power informs discourse. It is true that

the public sphere that Habermas describes, starting with the bourgeois public

sphere of 18th century Europe, manifests these power differentials. Participation in

the bourgeois public sphere was largely limited to "a small group of educated men

of means" (Finlayson, 2005, p. 12). Such a public sphere excluded non-whites,

the poor, the uneducated, and women. Moreover, Avritzer (2002) points out that

leaving the weight of public discussion to power-holders gives the citizens no

alternative recourse in the event the power-holders choose legitimation crisis over

implementing the decisions reached through public deliberation.

Obviously, the public sphere is not a neutral space as different players are

positioned differently within the public space. With regard to policy-making,

McGee (2004) points out that the policy process is not a linear process even

though the linear model entailing problem identification, solutions(s), and

implementation is still popular with policy makers. Rather, the process involves

an intricate and dynamic interplay of actors, spaces and knowledge.

Within this interplay, power is negotiated and contested. As such, policy analysis

should interrogate issues of power within the policy framework. In this regard,

questions about who participates in the public space, who frames particular

policies, and whose, or what, knowledge counts as legitimate are paramount
(Fraser, 2009; Gaventa, 2004, 2006; McGee, 2004).

While acknowledging the concern by Habermas to leave the intricacies of
administrative detail to power-holders, Avritzer (2002) suggests a model, which
he calls participatory publics, that allows public opinion to assume an institutional
dimension without necessarily devising alternative forms of administrative
structures. Such a model, while allowing administrative leeway to power-holders,
would allow "the formation of mechanisms of face-to-face deliberation, free
expression, and association, at the public level" (p. 52) and at the same time give
the public the prerogative to monitor the administrative implementation of their
decisions.

Ultimately, the idea of discursive public space has much merit as it opens
up the space for public discussion of issues whose interpretation was previously
the monopoly of symbolic institutions such as the church (Avritzer, 2002). Such a
space of free participation, as Benhabib (1992) further points out, is not only
egalitarian, but also allows new issues, such as the exploitation of workers and
women within the private realm, to enter public debate.

The construct of participation in organizational management.

Participatory policy-making, in the context of organizational management,
draws mainly from two related theoretical foundations, namely,
collaborative/communicative theory in planning and deliberative democracy
theory in political science (Hopkins, 2010). At the core of participatory policy-
making are questions about who participates, how decisions are made, and how

the participants relate within the policy space (Dryzek, 2000; Fraser, 2009; Hopkins, 2010). Since the 1990s, the concept of participation has been one of the "buzzwords" in organizational management, initially in the development sector and later in government (Mefalopulos, 2003, p. 2). As Hussein (1995) further points out, "participation has become the dominating ideology in contemporary thinking in both non-governmental organizations and governmental/inter-governmental agencies" (p. 170).

Notions such as inclusiveness, privileging marginalized voices, and participatory democracy underlie the idea of participation. Many international organizations and, increasingly, many governments too, are incorporating participatory frameworks in their policy processes. In Europe, for example, the Organisation for Economic Cooperation and Development (OECD) has called for new ways to include citizens in policy-making through "a relation based on partnership with government, in which citizens actively engage in defining the process and content of policy-making" (OECD 2001: 12).

The shift to participatory frameworks in organizational management was a result of dissatisfaction with the hierarchical bureaucratic structures of policy rationalism that dominated organizational theory and practice up to the 1980s. Initially, the shift saw the emergence of models such as market and networks (Geurts & Joldersma, 2001; Head, 2007; Schneider & Ingram, 1997). The market approach, which arose in the 1980s and 1990s, emphasized the introduction of market mechanisms in public management. The aim was to control the excesses of public sector hierarchies by making public policy responsive to the preferences

of other stakeholders, especially those with an economic stake in the policy (Tenbensel, 2006). Network governance initially arose out of the recognition that the numerous service providers created to concentrate on core business within the market approach were not necessarily confrontational and in opposition and could indeed be complementary. Network governance, as such entails co-operative and collaborative relationships between policy actors. Such policy actors include "governmental policy makers, stakeholders in markets, knowledge producers, relevant non-governmental organizations, and groups that are somehow representative for target groups or citizen movements" (Hoppe & Jeliazkova, 2006, p. 55).

The participatory paradigm is, in fact, an umbrella term for a variety of approaches that include, among others, deliberative public administration (Baccaro & Papadakis, 2008), associational democracy (Cohen & Rogers, 1995), direct deliberative poliarchy (Cohen & Sabel, 1997), and empowered participatory governance (Fung & Wright, 2003). Scholars of organizational management agree that a participatory approach to management and policy processes is beneficial (Bachrach & Botwinick, 1992; Ben-Ner & Jones, 1995; Cooke, 1994; Hussein, 1995).

A study of participation by line workers by Marshal and Stohl (1993) found a strong co-relation between the degree of worker involvement in organizational decision-making processes and worker satisfaction. Miller and Monge (1986) found that participation in decision-making processes improved worker satisfaction and performance. Such participation is a viable strategy since

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it enhances the flow and use of information within the organization. Furthermore, according to Miller and Monge (1986) such participation leads to "greater attainment of higher-order needs such as self-expression, respect, independence, and equality, which will in turn increase morale and satisfaction" (p. 730). In a survey of 93 public and private sector organizations in Barbados by Nurse and Devonish (2008), 85% of the managers surveyed agreed that introducing worker participation was a good idea. The study found that employee participation in organizational decision-making resulted in higher levels of job satisfaction, increased joint benefits, and reduced absenteeism. Doucouliagos (1995) examined the effects on productivity of various forms of participation in different organizations. The study, a meta-analysis of 43 published studies, found that profit sharing, worker ownership, and worker participation in decision-making are all positively associated with productivity.

Essentially, participation entails a dialogical relationship and feeds on the assumption that government will be seen "to be in the middle of all other stakeholders with a two-way relationship occurring between the actors and government" (de Jong, 1996, p. 166). Hopkins (2010) highlights four procedural requirements for effective participatory policy-making, namely, (a) inclusion of as many of the affected parties as possible, (b) equality in the policy-making process irrespective of the participants' external power status, (c) face to face discussions, prioritizing public over private interests, and (d) emphasis on decision-making through consensus.

This model is a negation of the traditional regulative governance model whereby the government stands at the top of the policy-making process in a one-way relationship with all the other parties. This shift is what makes participation a problematic notion since it involves the (re)negotiation of power within the organization, a process that could, at times, lead to conflicts and even slow down decision making. The ideals of equal participation and privileging public over private interests are, indeed, problematic as participants come into the process with interest positions and wielding varying amounts of power. In reality, more often than not, the policy-making process is a terrain marked more by power struggles and contestation over varying private interests than by the quest for public good and consensus-building (Dryzek, 2000, Huxley, 2000). This lends credence to the observation by Stacey (2007) that participatory policy-making does not guarantee better policy decisions.

Nevertheless, participative organizational management processes are desirable since, besides enhancing worker satisfaction, they contribute to the larger political project of affording the otherwise marginalized classes opportunities to voice their interests; thereby furthering the democratic objective of equality (Bachrach & Botwinick, 1992). Moreover, participatory theorists, inspired by Freire (1997), view participation as a value in itself and not just a means to an end. An important idea from this school of thought is that it is possible, indeed a right, for poor and marginalized people to name their experiences and to participate in seeking solutions to their problems. Furthermore, as Chambers, commenting on participatory development frameworks, argues,

participation resonates well with the "post-modern understanding of multiple realities, and the recognition that professional realities are constructed differently from those of local people" (1998, p. 280). At the work place, thus, participatory organizational management processes would harness the experiences of management and line workers to make the workplace a more democratic and enjoyable shared space.

Ultimately, the ideal of participative policy-making, and indeed the overall project of deliberative democracy, is to make participation the overarching governance philosophy rather than just a technique (Parkinson, 2004). The former underscores the role of citizens as joint policy-makers with the traditional policy experts. This, as Hopkins observes, makes participation "less of a shift in democratic procedures and more of a pragmatic response to the challenges of implementing expert-driven plans" (2010, p. 272).

Overview of the Theoretical Frameworks

From the foregoing discussion, the idea of participation has emerged as a key element in both motivation and participation theories. From a broader governance perspective, participation, whether seen through traditional African or Western philosophical lenses, is foundational to an expansive understanding of democracy. As Gaventa (2004) rightly observes, inclusive participation is not only the right to participate effectively in a given policy space, but the right to define and to shape that space in the first place.

In the context of this study, three important ideas emerge from this theoretical analysis. First is the need for examining and understanding the factors

that may influence the decision by teachers to work and remain in, or to leave, schools in the hardship areas. Such factors could relate directly to the job and the work environment, or they may relate to circumstances external to the job and the work environment. Second is the idea of the public sphere. With regard to staffing schools in hardship areas, it would be prudent to examine the policy space with regard to who constitutes the public space. In this regard, Fraser (2009) would suggest the "all-affected principle" (p. 24) to constitute the stakeholders. Closely related to this is the third idea, namely, participation. This brings to mind not only the question of who participates in the policy space, but also the power dynamics (Dryzek, 2000; Fraser, 2009; Kamenetzky, 1992; Max-Neef, 1992) within that space. An important issue here is to examine whether, and to what extent, decentralized teacher management has given voice to grassroots stakeholders in the policy process.

In the following section, I examine literature relating to teacher recruitment and retention in schools in remote rural areas in various parts of the world. The literature relates to the problems facing teacher recruitment and retention in both developed and developed countries, an examination of the qualities of long-staying teachers in remote rural schools, and the policies relating to recruiting and retaining teachers for remote rural schools in various countries.

Challenges in Rural Teacher Recruitment and Retention

      Challenges in staffing rural schools in developing countries.

While there is extensive research on teacher recruitment and retention in the developed world, there is a dearth of research in this area in the developing

world and especially in Africa (Bennell, 2004). However, the available research (e.g., Cobbold, 2006; Mulkeen, 2006) shows that many countries in Africa are struggling to ensure that they have enough teachers for their schools, especially those in the remote rural areas. Teacher shortage for rural schools, especially those in remote areas is especially a big problem. In Ghana, a national study on teacher demand and supply by Quansah (2003) reported a shortage of 40,000 teachers in basic schools (first nine years). The study further reported that urban schools had enough teachers and it is the rural schools especially in the deprived rural areas that teacher shortages were most severe. The government resorted to recruiting untrained teachers to ease the problem. In a study covering five African countries, namely, Mozambique, Lesotho, Malawi, Uganda, and Tanzania, Mulkeen (2006) found that even though the countries experienced a general shortage of teachers, the shortage of teachers in isolated rural schools was a complex problem entailing more than just the lack of sufficient numbers of qualified teachers.

At the heart of rural teacher shortage are policy issues relating to teacher deployment, utilization, and management. Teacher deployment is especially a nagging problem for many education authorities in Africa, as many teachers prefer to work in urban areas rather than in rural schools (Akyeampong & Lewin, 2002). Various factors contribute to this preference. In some countries, the majority of the teachers are from urban backgrounds and thus prefer postings to urban areas (Hedges, 2002). In addition, teachers may fear the rural areas due to perceived difficulties, diseases, and health risks (Towse, Kent, Osaki & Kirua,

2002). Urban areas are, moreover, attractive because they offer opportunities for career progression, further study, and additional income (Mulkeen, 2006). As a result, teacher shortage in many countries is in rural areas. In their study on the utilization, deployment and management of teachers in Botswana, Malawi, South Africa, and Uganda, Gottelmann-Duret and Hogan (1998) found glaring imbalances in the geographical distribution of teachers in all the four countries. They also found that many of the urban schools had enough teachers while the rural schools suffered teacher shortage, with some having particularly high numbers (25% to 47%) of unqualified teachers. Studies have also found that newly qualified teachers posted to rural schools do not often take up their first posting. Such teachers often end up in schools of their choice, thereby defeating government efforts to distribute teachers equitably (Hedges, 2002). Similarly, In Brazil, Dellanoy and Sedlacek (2000) found that schools in remote rural areas experienced acute teacher shortage. Moreover, although overall pay, retirement benefits, and working conditions for teachers were attractive compared to other public sector jobs, there was no policy specifically addressing the shortage of teachers in remote rural areas.

The socio-economic well-being of the teachers is another important issue. In this regard, concerns with remuneration are paramount. In Mozambique, dissatisfaction due to low salaries and poor working conditions has led to worrisome teacher attrition. Although the government has realized the important role played by teachers in the quest for UPE, the teachers are, in most cases, "demoralized and lacking in motivation because their pay is inadequate and

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sometimes does not arrive at all" (MINEDAF, 2002, p. 610). In Tanzania, a study showed that dissatisfaction over low pay was responsible for teachers taking up second jobs and, frequently, for teacher absenteeism. In the primary school sector, 77% of the teachers earn additional income from outside jobs (Gaynor, 1998). In Uganda, primary school teachers earn less than US$400 per year and many of them have a second job, usually farming or a small-scale business, to supplement income (Gottelmann-Duret & Hogan, 1998). In Zambia, a report by the Ministry of Education (1999) shows that teacher attrition in the public schools has increasingly become a source of concern in the country. Such attrition is mainly due to low salaries and poor working conditions. The report describes those who remain as "underpaid, poorly housed, demoralised, poorly deployed, and provided with little support in the field" (Ministry of Education, 1999, 6.2.14).

The efficiency of paying salaries is another major cause of low morale for teachers, especially in remote rural schools. There are many cases of late payment of salaries as well as slow processing of allowances. Rectifying these problems may lead to more teacher absenteeism as teachers make long and frustrating visits to the education offices that are often located in large urban centres (Voluntary Service Organization [VSO], 2002). Furthermore, late payment of salaries and allowances imposes hardship on teachers and lowers their professional esteem. In Ghana, for instance, teachers have reported delays of salary payments by up to nine months (Hedges, 2002). In Malawi, teachers who went on transfer reported that it took as long as three months before they received salaries through their new stations (Gottelmann-Duret & Hogan, 1998). Such delays are more traumatizing

for teachers in remote areas who are furthest from their families and other support networks.

In countries with different ethnic or linguistic groups, personal factors play an important role in teacher retention. In some countries, the teacher's first language is not a criterion in deciding on placement and therefore a teacher could be deployed to an area where he or she does not speak the local language. This limits the teacher's capacity for social interaction. It also makes teaching more difficult (Coultas & Lewin, 2002).

In some countries, such as Zambia, education authorities transfer teachers to remote rural schools as a form of punishment (VSO, 2002). This can however be counter-productive as it sends wrong signals to the teachers already working, or willing to work, in such schools. Moreover, such a punitive measure is futile as it takes the teachers who have caused trouble to schools that are furthest from supervision (Mulkeen, 2006).

The treatment teachers receive from government and individual schools is an important item in the discussion of rural teacher recruitment and retention. The study by VSO (2002), which involved teachers in Malawi, Zambia, and Papua New Guinea, found that teachers felt disempowered, with little say over their deployment, promotion, or in the running of their schools. The study identified the following complaints raised by teachers: (a) not being listened to, (b) lack of respect from head teachers, (c) being reprimanded in the presence of their students, (d) unfair promotions, (e) female teachers not getting extra responsibilities, and (f) lack of transparency about decision making, particularly

in financial matters (p. 36). These complaints reveal that teachers are not treated as professionals, even within their own schools.

Commenting on the status of the teaching profession in sub-Saharan Africa, Nilsson (2003) argues that the teaching profession has to be an attractive choice in order to recruit new and retain experienced teachers in the profession. Teachers' low wages and poor working conditions are strategic areas in need of improvement to achieve this. To be able to do a good job, teachers need possibilities, good working conditions, and competitive salaries.

Challenges to staffing rural schools in developed countries.

Teacher shortage in rural schools is not a problem peculiar to Africa and the less developed world. Many countries in the developed world experience problems in attracting and retaining teachers to rural school districts (Boylan & McSwan, 1998; Menlo & Poppleton, 1990; Thomas-El, 2004; Yarrow, Ballantyne, Hansford, Herschell, & Millwater. 1999).

In the USA, for instance, rural school districts have problems attracting and retaining quality teachers. The shortage of teachers in the rural schools affects all subject areas but is particularly acute for math, science and special education (Collins, 1999; Harmon, 2001). In the USA, just like in Africa, the issue of teacher shortage is really a question of distribution (Bradley, 1999). This is because some districts have surplus teachers while others have shortages. Rosenholtz (1985) says that the main problem of establishing and running good schools in poor settings is that "…good teachers are difficult to recruit and almost impossible to retain because the rewards of teaching do not outweigh the

frustrations" (p. 354). Poor pay has been cited as one of the major reasons for leaving teaching (Ingersoll, 2001; Perie, Baker, & Whitener, 1997). Hammer, Hughes, McClure, Reeves, and Salgado (2005) reported that staff in rural schools earned lower than average pay generally and that teacher salaries averaged $41,131 compared to $43,460 for small towns and $50,844 for suburban areas. They further observed that the stringent teacher certification requirements under the "No Child Left Behind" (NCLB) Act of 2001 were further disadvantaging rural schools. Many rural teachers would find it hard to attain the required certification due to long distances from colleges and training facilities. Moreover, getting release would be difficult for these teachers due to the unavailability of adequate substitute teachers in such rural schools. Thus the "more stringent certification requirements add another disincentive for teachers to take positions in rural schools" (p. 5).

A major reason for teacher turnover in the rural school districts is isolation (Collins, 1999; Inverarity, 1984). Inverarity (1984) identified five types of isolation for rural teachers, namely, physical, interpersonal, cultural, intellectual, and personal isolation. Physical isolation has to do with harsh geographic and climatic conditions. Interpersonal isolation relates to distance from family and friends, while cultural isolation entails issues arising from community expectations and community differences. Intellectual isolation refers to absence of opportunities for professional development and intellectual engagement. Personal isolation includes lack of contact with people with similar interests and non-work pursuits. D'Plesse (1992) would add informational isolation, which refers to

isolation arising from lack of modern methods of communication such as internet and mobile phones.

A study by Murphy and Angelski (1996) examining the reasons for teacher turnover in a rural school district in British Columbia, Canada, found that teachers leave because of geographic isolation, distance from family and larger communities, inadequate shopping, and weather. Isolation is particularly problematic to young beginning teachers (Proffit, Sale, Alexander, & Andrews, 2004). In Australia where teacher shortage in rural schools is very high owing to the country's low rural populations scattered over a large country (Hudson & Hudson, 2008), studies have found isolation to be a major problem for beginning teachers.

Besides isolation, Hudson and Hudson (2008) identify classroom burn-out, overwork, being put on contract without the assurance of permanent employment and lack of social status as reasons that "trigger an exodus from rural class rooms" (p. 68). In their study Schwartzbeck, Prince, Redfield, Morris, and Hammer (2003) identified other reasons to include inadequate housing, community poverty, and the expectation to teach multiple grades or multiple subjects. Moreover, it is probable, as Hammer, et al. (2005) note, that young teachers would choose rural schools to launch their career before moving on to more comfortable and better paying schools in urban or suburban areas.

Those who Stay

There are, of course, teachers who choose to live and work in schools located in remote rural areas. However, as Storey (1993) points out, there is a

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dearth of "studies that add substantially to our knowledge of these people: what they need during their pre-service preparation, why they go to work in small communities, what keeps them there, and why they leave" (p. 160). Studies in Australia, Canada, China, and the USA have tried to theorize on, and profile, teachers who choose to work and stay in remote rural schools. The profile of such teachers can be summarized as relating to the biographical, work-related, and lifestyle attributes of the teachers (Boylan & McSwan, 1998). The studies found that these teachers tended to be married and had rural backgrounds – in the sense that they had a rural upbringing and attended rural teacher education institutions (Boylan & McSwan 1998; Collins, 1999; Haughey & Murphy, 1985; Storey, 1993). With regard to their work, the teachers cited high levels of satisfaction with teaching and that they enjoyed their close interaction with their pupils in the predominantly small-class-sized rural schools.

In a study of 558 teachers in a rural school district in British Columbia, Canada, Storey (1993) examined the views of rural schoolteachers about their work and the factors that had influenced their decisions to teach in the district, to stay there, and to leave. The study identified several clusters of factors that guided the decisions of teachers who chose to teach and to remain in a remote rural school. The characteristics relate to teacher characteristics, work place conditions, and compensation.

In their study examining job satisfaction and dissatisfaction among teachers in rural Alaska, Kleinfeld and McDiarmid (1986) surveyed 304 teachers and found that the majority of the teachers (93%) were very satisfied with their

relationship with the students and especially with the low level of discipline problems in the rural schools. Moreover, the literature says that teachers in remote rural schools find satisfaction in the relatively relaxed and secure rural environment, and their engagement with the local communities. In their survey of 94 rural schoolteachers in British Columbia, Murphy and Angelski (1996) found that teachers chose to stay due to a positive working relationship with the school principal, employment in the community for their spouses, and satisfaction with the rural lifestyle. A remark by one of the teachers in the study by Storey (1993) regarding teaching in a rural school is illustrative of this satisfaction with rural teaching: "Where else can one have children, golf, ski, fish, hunt, hike, and mountain bike for less than $1,000 a year?" (p. 166)

The issue of commitment to teaching as a career is a theme that is present in all these studies. In their study to establish the attributes of long-staying teachers in the Australian context, Boylan and McSwan (1998) surveyed 427 teachers in a remote rural district. The study found that 81% of the teachers reported high levels of commitment to teaching. These teachers reported a high level of integration with the local community and a personal satisfaction with a rural lifestyle. This resonates with the argument by Harmon (2001) that not all teachers are predisposed to working in a rural setting and that besides certification and experience, "comfortable fit" with the rural environment is a necessary quality for a prospective rural teacher (p. 4). These findings are consistent with the findings by Sargent and Hannum (2005) in their study of job satisfaction among teachers in a poor province in rural China.

Boylan and McSwan (1998), drawing on the findings of their study, attempt to profile a rural schoolteacher. Below is their cameo description of a long-staying rural teacher:

John lives in the rural community of Monolac with his wife and two teenage children. They have lived in town for the past eleven years. John's wife is also a trained teacher who does some part-time relief teaching at the school. John grew up in rural New South Wales. He completed his pre-service education course at one of the three inland rural teacher education institutions in New South Wales. He has been teaching for sixteen years. For the last eleven years, he has been a classroom teacher at Monolac. John thoroughly enjoys working with the children in his class and derives great personal and career satisfaction: from the way he is able to personalize and adapt his teaching to the needs of his students and from the close relationships he develops with the students and his colleagues. He enjoys the respect and status given to him by the community and participates in a variety of community groups, including service clubs, recreational and sporting groups and church groups. John believes his family and himself are accepted as part of the Monolac community. They have no plans to move in the near future. They own their house in town and realize that the quality of lifestyle they enjoy in Monolac would not be possible in an urban centre. They value the rural landscape, the clean environment, the high level of public safety, law and order in town, the close friendships they have with other community members, and the

caring attitude of Monolac. John and Judy are aware of the need to provide

a diverse range of life experiences for their children and themselves,

especially culturally based activities, which they achieve during visits to

Sydney in school vacation times. For John, .Judy and their family,

Monolac is home. (p. 49)

This cameo, consistent with the literature reviewed above, shows that

context, as Sargent and Hannum (2005) would have, underlies the joys and

frustrations of teaching in remote rural schools. This refers to the contexts in

which teachers function, to the schools where they teach, and to the characteristics

of the individual teachers. It is evident that John has a high level of satisfaction

with his job as a teacher in a rural school. His satisfaction proceeds from his

having established a "home" in the rural area, both in the literal sense and in the

sense that the local community has accepted him and his family as part of the

community. Moreover, John and his family participate actively in community

functions. John's satisfaction, while not arising from any evident policy

intervention, is illustrative of contextual factors (personal and community

characteristics) that educational authorities could act upon to formulate effective

policies for recruiting and retaining teachers in remote rural schools.

In the section below, I discuss the various policy interventions for staffing remote

rural schools.

Policy Interventions to Teacher Shortage in Rural Schools

The concern for attracting and retaining teachers to remote rural schools in various parts of the world has led to a variety of policy interventions. In a review of literature on recruitment of teachers in developing countries, McEwan (1999) summarized some of the policy interventions that had been enacted to address the problem of rural teacher shortage (see table 2.2 below).

Table 2.2 *Policy Measures for Attracting and Retaining Teachers to Remote Rural Schools* (adapted from McEwan, 1999, p. 851).

Country	Policy
Argentina	Up to 80% bonus on base salary
Bangladesh	Special training for rural service
Chile	Per-pupil subsidy for public and most private schools increased in rural and poor municipalities
Costa Rica	Salary bonus and extra time towards retirement
Egypt	Seniority requirements reduced by 2 - 4 years; longer vacations travel allowance for teacher and family; recruitment of local women
Guyana	Accelerated promotion opportunities; travel allowances to purchase consumer goods
Honduras	Three years of rural service counted as five years in calculation of seniority; 25% bonus on base salary
Iraq	Free housing
Jamaica	Rise two steps in pay scale
Libya	Payment of some travel and moving expenses
Mexico	Reduced-rent housing; in some cases houses are built for teachers; compensation for damage caused by crime
Nepal	Up to (and occasionally exceeding) 100% bonus on base salary
Pakistan	Housing clusters for female teachers
Philippines	Up to 25% bonus on base salary
Senegal	Housing allowances
Syria	Loans for purchase of house; compulsory rural service at beginning of career
Venezuela	Twelve years of rural service entitles teacher to 20% pay raise; special training for rural service
Zimbabwe	Loans for purchase of house

The various interventions illustrated in the table above are informed by the understandings of rurality by the respective education authorities. Such understandings can be classified, after Dove (1982), into two broad models, namely, the rural deficit model and the rural challenge model.

The rural deficit model.

The rural deficit model views life in remote rural areas as "nasty, brutish and short" (Dove, 1982, p. 12). Policies relating to this view include compulsory postings and transfer of teachers to remote rural schools as well as various incentive packages.

Some countries have resorted to forcing teachers, especially the newly employed, to work in rural areas (Gottelman-Duret & Hogan, 1998). Countries like Malawi, South Africa, and Zambia have attempted this strategy. Even though it has little financial cost, forced deployment can damage teacher morale and lead to high turnover of teachers (Mulkeen & Chen, 2008). In South Africa, for example, an effort to redeploy teachers to remote rural schools failed mainly because the predominantly female teaching force was not mobile enough (Mulkeen & Chen, 2008). When the government applied pressure for teachers to relocate, many math and science teachers quit teaching. Moreover, this pressure led to a decline in the number of applicants to teacher training colleges since, as Samuel (2002) observed, "as a consequence of the embattled status of teachers within the system, school leavers have voted with their feet to choose careers other than teaching" (p. 408). The compulsory posting of teachers to remote rural schools, moreover, could be self-defeating since, as Dove (1982) argues,

The message relayed by such devices inevitably suggests that service in

remote rural areas has to be enforced otherwise no one would do it. Thus,

young and inexperienced teachers must do a sort of penal servitude before

their real professional lives begin, and those transferred to rural schools

later in their careers see it as some sort of punishment or disgrace. (p. 13)

Indeed, as pointed out earlier, authorities in some countries use transfers to

remote rural schools as punishment for teachers involved in misconduct (VSO,

2002). Such a policy is counterproductive as it not only fails to reform the

misbehaving teachers, but also, more significantly, gives official sanction to the

view that teaching in a remote rural school is disgraceful (Dove, 1982; Mulkeen,

2006; VSO, 2002).

Policies informed by the rural-deficit model also include incentive

packages to motivate teachers to take up postings in rural schools. Such incentives

include hardship allowances, travel allowances, enhanced promotional prospects,

and housing (Gaynor, 1998; McEwan, 1999). In Zambia, for instance, the

government undertook to improve the salaries especially in the rural areas, to

introduce a rural hardship allowance, and at the same time freeze posting to urban

areas (Zambia Country Report, 2000). In Mississippi (USA), the state dealt with

the challenge of staffing rural schools through an Employer-Assisted Housing

Teacher Program that provided interest-free loans to licensed teachers. The state

also offered loan repayment for students who taught in rural areas (Hammer et al.,

2005).

Ultimately, strategies associated with the deficit model are, at best, short-term and only meant to attract teachers to schools where they would not have otherwise considered teaching (Dove, 1982). While supporting this view, Holloway (2002), cautions that salaries alone cannot guarantee that teachers would stay in an isolated region. He cites the case of Wyoming where, despite enacting the highest teacher salary increase in the nation for the 2001-2002 school year, "overall teacher attrition continued to climb upward as teachers transferred from the western part of the state and into schools located near larger towns" (pp. 144-145).

The rural challenge model.

The rural challenge model (Dove, 1982, p. 15) entails that "*for the teacher who is able to cope*, the special qualities of the job in rural schools provide an intrinsic professional challenge and interest" (emphasis in original). This model posits that teaching in rural schools is an enriching experience. Strategies associated with this model are founded on the assumption that teachers should view postings to rural schools as career-long prospects that are as professionally rewarding as postings to urban or suburban schools. Such strategies focus more on education, training, and teacher support programs rather than compulsion and incentives. In their survey, Hammer et al. (2005) identified five main strategies that, in my view, capture the general themes relating to the strategies associated with this model. These included, (a) "grow-your-own" initiatives (b) targeted incentives, (c) improved recruitment and hiring practices (d) improved school-

level support for teachers, and (e) use of interactive technologies, to help alleviate the problems rural schools face in recruiting and retaining high-quality teachers.

Teacher education specifically addressing the challenges and realities of rural school life is a popular strategy in the literature. Yarrow et al. (1999) note that there are several programs specifically addressing the education of teachers for schools in rural and remote areas. In Australia, for example, schools of education in several universities have teacher education programs specifically targeting rural schoolteachers. Such programs focus on theoretical and practical studies of rural community and school community relationship, roles and expectations of teachers in rural schools, multigrade organizational and teaching strategies, and practice teaching in small rural schools (Boylan, Squires, & Smith, 1993). In Arizona, a rural district in Lake Havasu City established partnerships with two out-of-state universities – Southern Utah University and Montana State University – whose teacher preparation programs were likely to include students already comfortable with living in rural areas (Crews, 2002). This venture, which initially started as a creative project by a rural school district to recruit teachers from out-of-state universities, later became an important university-community project. The Arizona district provided students from the two universities an opportunity to serve as student teachers, and the possibility of subsequent employment. The district ended up hiring six of the first ten student teachers from Southern Utah University who participated in the program.

Another strategy discussed in the literature is teacher support and mentoring programs, especially those involving linkages with local communities.

Clewell, Darke, Davis-George, Forcier, and Manes (2000) identified one such effort, the California New Teacher Project, which included an induction component testing alternative models of support for beginning teachers across the state. The program led to "reduced attrition among first and second-year teachers by two-thirds, and retention rates improved for teachers working in rural areas" (p. 40). Such community-linked support programs are important in that, besides making teachers feel welcome in remote rural communities, they also help to debunk the rural myth that rural areas are inferior to urban areas (Doecke, 1987; Sher, 1991). Regarding in-service support, the literature suggests that there is need to develop more effective partnerships between universities, departments of education, and community members and organizations (Harris & Collay, 1990; Lunn, 1997; Stupiansky & Wolfe, 1991). This is particularly important since a distinguishing characteristic of effective rural retention is the ability to capitalize on the power of "rootedness" within the community (Hammer, et al., 2005, p. 12).

An interesting measure associated with the rural challenge model is the use of technology to aid teacher recruitment and support programs. Technology can bridge the isolation gap in rural areas by providing support, information, and resources to educators (Hammer, et al., 2005). A good example of such a project is The New Teacher Center in Santa Cruz, California (USA), which offered e-mentoring networks for beginning and experienced science teachers, scientists, and school administrators. The network included online mentoring, online seminars focused on content and examination of student work, and leadership training for mentors and scientists (Moir & Bloom, 2003).

Decentralized teacher management.

Over the last 20 years, there has been considerable policy shift towards decentralized teacher management as part of the broader decentralization of education particularly in the developing world (De Grauwe, Lugaz, Baldé, Diakhaté, Dougnon, Moustapha, & Odushina, 2005; Fiske, 1996; Gershberg & Winkler 2004). The shift was mainly a response to the realization that centralized management was inefficient especially with regard to equitable distribution of resources as it tended to disadvantage the fringes (rural areas) at the expense of urban areas (Cummings, 1997). In Sub-Saharan Africa, this shift has been fuelled, more so, by political expediency. Given the rapid expansion of education systems to meet the universal primary education targets, many African governments have been unable to adequately finance education and have thus resorted to various forms of cost-sharing and decentralization (De Grauwe, et al., 2005). Moreover, institutions such as the World Bank, the United Nations Educational, Scientific and Cultural Organization (UNESCO), and the International Monetary Fund (IMF) have influenced and supported decentralization of education as part of the wider reforms towards decentralized government (McGinn, 1997; Samoff, 1993).

Ideally, decentralization, as a project of democratic governance, counters the hegemony of democratic elitism (Avritzer, 2002) whereby decision-making is the preserve of elites. Avritzer further states that

> because the gap between the political space and political representation is
> still wide in post-authoritarian countries … the most sensible way to
> further democratize state-society relations is to transfer democratic

potentials that emerge at the society level to the political arena through

participatory designs. (2002: pp. 8–9)

Thus viewed, decentralization serves three broad functions, namely, (a) to

maintain a politically legitimate dispersal of authority, (b) to render good quality

services, and (c) to optimize efficient use of resources (Lauglo, 1995). With

specific reference to education, decentralization serves the purpose of "increasing

effectiveness by moving control over the schools closer to the parents and

communities and making education more responsive to local problems and needs"

(Lee, 2006, p. 149).

The literature also points out various forms of decentralization. Fiske

(1996) identifies two broad types of decentralization, namely, political and

administrative decentralization. Political decentralization, on the one hand, is

about the locus of power and entails "assigning power to make decisions about

education to citizens or to their representatives at the lower levels of government"

(Fiske, 1996, p. 9). Such an arrangement necessarily includes sharing authority

with people outside the system. Administrative decentralization, on the other

hand, is a management strategy. Political power remains with officials at the top

of the organization, with certain responsibilities assigned to lower levels of

government or to semiautonomous authorities. Within this arrangement, authority

remains within the system.

Rondinelli (1981) further disaggregated administrative decentralization

into three strands, namely, deconcentration, delegation, and devolution. This

typology was later adapted to education by Winkler (1989). Deconcentration

involves shifting of management responsibilities from the central to regional or other lower levels in such a way that the central ministry remains firmly in control. Though such deconcentration does not give any real decision-making powers to the lower offices, Rondinelli (1981) says it is an important initial step towards full decentralization especially in highly centralized governments in developing countries. Delegation is the reversible assignment of some powers by the central or regional education authorities to school principals or school committees. Finally, devolution is the most elaborate form of decentralization and it entails the permanent shift of power from the central authorities to local or school authorities. As such, the central government education officials cannot revoke the devolved powers (Fiske, 1996).

Decentralized teacher management is the least developed element in decentralization of education in Africa (Gershberg & Winkler 2004). This is because central governments are still largely in charge of teacher recruitment and management. Some of the countries in sub Saharan Africa that have adopted some form of decentralized teacher management policies, especially with regard to teacher recruitment, include Malawi (Rose, 2003), Benin, Senegal, Guinea, and Mali (De Grauwe, et al., 2005), Ghana (Cobbold, 2006), and Uganda (Brosio, Gonzalez, & Ahmad, 2006). In the majority of cases, regional and local authorities have powers to recruit and post teachers but the real power over teacher management resides with the central government through the ministry of education, which is in charge of teacher salaries. An exceptional case is that of Benin (De Grauwe, et al., 2005) where, since 2002, the central government has

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been transferring funds directly to schools. The practice has enabled schools to hire and pay teachers. The study, however, notes that this positive trend has been driven more by a decision to supplement the lack of resources in rural schools rather than a genuine interest in devolving power to the grass roots.

Different countries have adopted different approaches to decentralization of education and teacher management. Countries such as Nicaragua, Indonesia, Chile, and Tanzania have adopted what Gershberg and Winkler (2004) call a "big bang approach" (p. 23) entailing quick and radical transfer of functions and responsibilities to school and local authorities. Other countries like Guinea, Senegal (Naidoo, 2005), and Malawi (Rose 2003) have adopted a phased approach starting with deconcentration of certain responsibilities from the headquarters to schools and local education offices, and then gradually increasing the levels of decision-making autonomy while at the same time strengthening the management capacity of the school and local education authorities.

While there is no evidence to show which of the two approaches to decentralization yields better results, Gershberg and Winkler (2004) argue that there is evidence to show that the phased approach gives time for those who would lose from decentralization to create barriers to its implementation. Teachers' unions, for example, are generally opposed to decentralized management of teachers due to fear of losing negotiating power, as decentralization would entail negotiating with multiple authorities (Gaynor 1998). Moreover, the unions would argue that such decentralization has led to delayed or non-payment of teachers' salaries as well as abuse of power by local officials in

Brazil, Nigeria, and Zimbabwe (Gaynor, 1998). Indeed, in Colombia the teachers union brought its members out on strike to oppose government plans to decentralize teacher management in 1992, forcing the government to abandon the proposed policy changes (Montenegro, 1995).

Moreover, even in advanced democracies, it is hard to quantify the real extent of devolved decision-making power in decentralized education systems. This is because central or federal governments still wield much control over decisions regarding curriculum, staffing requirements, and expenditure of state grants such that school and local education authorities have little real power even though they may have a high degree of decision-making autonomy (Gershberg & Winkler 2004).

In the context of this study, an interesting issue relating to decentralized teacher recruitment with regard to staffing schools in hardship areas in Kenya is the question whether the recruiters should specifically target teachers from the local area. The literature is in favour of such a strategy as teachers from the local area would be more likely to stay longer in the school (Hammer, et al., 2005; Kannapel & DeYoung, 1999). In Ghana, the government undertook a district-based program for sponsoring teacher trainees in 2000/2001 to address the problem of teacher shortage in remote rural schools (Cobbold, 2006). Under the scheme, districts sponsor candidates from remote rural areas to Teacher Training Colleges with the understanding that the teachers will work in the district for at least three years upon graduation. Though the program managed to attract many willing candidates, the policy did not adequately address the "retention

dimension" (Cobbold, 2006, p. 465), thus no guarantees that the teachers would stay on after the mandatory period.

Ultimately, there has been little systematic research on the implementation of decentralization at the local level especially with regard to teacher management and specifically regarding the staffing of remote rural schools. De Grauwe, et al. (2005) note that there is need for field research to identify in some depth the ways in which districts and schools manage the process of decentralization, the challenges they encounter and the strategies they introduce to overcome these. More importantly, there is need for country specific research that takes cognizance of the uniqueness of each county's context (De Grauwe, et al., 2005) as well as gender-disaggregated research that examines the effects of decentralization on men and women teachers (Gaynor, 1998).

Summary of the approaches to rural teacher recruitment and retention.

Ultimately, the use of different strategies to redress teacher shortage in remote rural schools rests entirely on the consideration of specific contextual factors. As Dove (1982) says, there is no suggestion that the sorts of strategies associated with one model are exclusive of those implied by the other. In any specific context, a mix of economic and professional incentives may be necessary to staff rural schools adequately. In Botswana, for example, a combination of coercion and incentives enabled the government to staff all its schools (Gottelmann-Duret & Hogan, 1998). In their survey of more than 3000 rural school superintendents, Schwartzbeck, Prince, Redfield, Morris, and Hammer

(2003), found that authorities used both training and financial incentives to attract and retain rural schoolteachers in the USA.

Undoubtedly, issues relating to the recruitment, deployment, and retention of teachers in remote rural schools are complex and require complex policy initiatives. As Hammer, et al. (2005, p.5) note, there are no "*rural-specific* and *successful*" (emphasis in original) model programs and practices. I agree with Holloway (2002), moreover, that the way forward lies in the quest for a "package of solutions" to address "the multiple dimensions" (p. 151) of attracting and retaining teachers to remote rural schools in different parts of the world.

Rationale for the Study

The literature reviewed in the preceding section gives helpful information with regard to understanding the complexities of recruiting and retaining teachers for schools in remote rural areas in various parts of the world. The studies have also pointed out the various measures adopted by education authorities to attract and retain teachers in remote rural schools. However, several loopholes exist, which, in my opinion, render problematic the attempt to understand, thus adequately address, the challenge of attracting, motivating, and retaining teachers in rural secondary schools in hardship areas in Kenya.

First, many of the studies are predominantly quantitative, relying mainly on quantifiable and thus statistically significant findings on various variables relating to teachers working in remote rural schools. For instance, the study by Sargent and Hannum (2005) on how context (teacher background, community factors, and school factors) affects the satisfaction of rural teachers in China

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entailed a large-scale survey of 100 village leaders, 128 principals, and 1,003

teachers. Storey (1993) studied 558 teachers spread over 26 remote rural districts

in British Columbia, Canada, in a study seeking to profile teachers in remote rural

schools. The study was mainly looking for "statistically significant data" (p. 163).

Schwartzbeck et al. (2003) surveyed over 3000 rural district superintendents to

gather data on teacher recruitment and retention practices in rural school districts

in the USA. The studies by Haughey and Murphy (1985), and Boylan and

McSwan (1998), looking at the attributes of long-staying teachers in remote rural

schools, were also predominantly quantitative.

　　While policy formulation has relied on these traditional lenses of logical

positivism, such a paradigm misses out the intimate qualitative details regarding

the lived experiences of the teachers working in remote rural schools. It would be

equally important to unpack the nuances of community, self, school, and place as

they are experienced by the teachers in the context of their daily interactions

inside and outside of the school. It is important, also, to explore the in-depth

experiences and meaning making by individual teachers to uncover meaningful

patterns that are not reducible to numerical data (Stake, 1994). An interesting

observation by Kleinfeld and McDiarmid (1986) from their survey of rural

schoolteachers in Alaska gives credence to this claim:

　　　　Teachers wrote in the margins of their survey that the district office "too

　　　　frequently forgot the village school," that the schools near the district

　　　　center receive an "unfair share" of equipment, and that "many of the

　　　　problems that face rural schools are self inflicted" by administrators "who

have never worked in rural Alaska" and "make decisions that do not fit

village life or needs." (p. 118)

Apparently, the teachers in the study mentioned above were not content with just

completing the questionnaire items. They felt that they had to express their

sentiments regarding issues that the questionnaire did not address but were,

nevertheless, important in their professional lives. Writing in the margins of the

survey is indicative of a desire to discuss the issues more extensively, thus a need

for research that interrogates such experiences more deeply.

While appreciating that studies grounded in rationalist perspectives offer

tangible data that is very handy for policy makers, I argue, together with Finch

(1986) and Smit (2003), that studies grounded in naturalist approaches, too, are an

important ingredient for the policy-making recipe. Research findings drawing on

the two approaches would offer complementary insights to policy makers and

administrators.

The concepts of rurality and hardship, too, are problematic. Cobbold

(2006) says that the literature on rural education displays "conceptual chaos" (p.

455) with regard to definitions of the terms rural and remote. Coladarci (2007)

observes that the problem, in fact, is not lack of conceptual consensus but failure

by researchers to describe the research context in sufficient detail. Rural schools

and communities differ markedly from one another, thus careful description is

particularly necessary to help practitioners and fellow researchers determine the

extent to which research findings "are appropriate for their districts, their schools,

and their faculty" (Wood & Kleine, 1988, p. 5).

Furthermore, as Wood and Kleine (1988) also note, rurality in developed countries is different from that of developing countries. In the Kenyan context, for example, such indicators as population size, percentage of working population, income per household, access to water, postal services, electricity, and internet may not present a fair picture of rurality and hardship. Moreover, majority (67.7%) of the Kenyan population live in the rural areas (Kenya National Bureau of Statistics, 2009), thus deployment of a teacher to a rural school is more the norm than the exception. Why then, one might ask, would teachers born and raised in rural areas be hesitant to take up appointments to such areas? I speculate that there are deeper underlying issues relating to, for example, the politics of ethnicity, religion, and gender, and their impact on professional issues such as promotions. A qualitative study is ideal for unearthing and interrogating such issues.

Owing to the preponderance of quantitative studies, moreover, the literature is bereft of detailed qualitative descriptions of the experiences of teachers in remote rural schools. In their attempt to profile teachers in remote rural schools, Boylan and McSwan (1998) present an interesting description of the long-staying rural teacher. This, however, is only a creative cameo based on their statistical analysis of responses from a survey of 427 long-staying rural teachers in Australia. In this study, I attempt, as much as possible, to give detailed descriptions of teachers' experiences in a rural remote school drawing heavily on the teachers' own narratives.

The reviewed studies also do not differentiate teachers for primary/elementary and secondary/high schools in their samples and analyses. Such differentiation is necessary in the Kenyan context since primary school teachers are, as a matter of policy, deployed to their home districts and so the issue of hardship may not be as pronounced for them. In this regard, this study specifically targeted secondary school teachers.

Finally, this study fills an important gap in research in the sense that there has been very little research on staffing remote rural schools in Africa. More importantly, and to the best of my knowledge, there has been no study in Kenya dealing with the issue of recruiting and retaining teachers in the hardship areas.

Overview of the Conceptual Framework

In chapters 1 and 2, I have sketched, in broad strokes, the conceptual framework for this study. In chapter 1, I highlighted the research problem while in chapter 2 I situated the research problem in the context of theoretical and research literature. From this sketching, two interrelated threads emerge. The first thread relates to the factors (both push and pull) that influence the decision by teachers to accept or reject postings to schools in remote rural areas. The second thread relates to the various strategies employed by governments and education authorities to respond to those factors. These two threads underpin the conceptual framework of this study.

As noted, the reasons why teachers choose to stay or to leave remote rural schools relate mainly to personal attributes and context – job related issues like pay and work environment, and non-work related factors such as the community,

security, availability of employment for spouses, and weather. Therefore, to understand the choices that teachers make, it is necessary to examine their personal circumstances as well as issues within and outside of the school. As Kleinfeld and McDiarmid (1986) observe, "since the sources of teacher dissatisfaction depend on the specific conditions of the schools in which they teach, research on rural teachers' satisfaction with their work life should describe with some care the particular community and school context" (p. 117).

Policy interventions to attract and retain teachers in remote rural schools draw on the policy makers' understandings of rural problems. Dove (1982) illustrates these understandings in the rural deficit and rural challenge models. The two models, as well as relevant ideas from motivation theories, offer an entry point for examining the policy interventions for attracting and retaining teachers in hardship areas in Kenya. The analysis, moreover, must entail an examination of the power relations, as well as systemic and historical factors that influence and determine those power relations (Dryzek, 2000; Fraser, 2009; Hopkins, 2010; Max-Neef, 1999).

In the context of this study, therefore, this conceptual framework translates into three tasks that guided both the field study and the analysis of the data. The first task is what I call a situational analysis, entailing examination of the various understandings and experiences of rurality and rural hardships. This arises from the recommendation by Kleinfeld and McDiarmid (1986) for a thorough understanding of the context within which the teachers work. These understandings relate to the official definitions of rural hardships as well as the

experiences and views of teachers and other stakeholders at the grass root level. Moreover, the situational analysis includes the historical analysis of the problem of rural teacher shortage – how the problem arose, and the issues surrounding the problem such as social justice and educational equity. The import of this first task is not only to identify the motivations and frustrations of the teachers, but also to ground them within social, political, and historical realities.

The second task is an examination of the policy framework relating to the management of teachers in hardship areas in Kenya. Two major issues comprise this task. First is examination of the policy interventions in place, entailing identification of the key policy players and analysis of how decision-making power flows within the framework. Second is examination of whether the interventions address the identified problems, and how the target beneficiaries, especially the teachers, view such policy interventions.

The third and final task, drawing on the first two tasks, is to suggest a policy framework and interventions that would potentially address the problem of staffing schools in hardship areas more effectively. Below (Figure 2.1) is a graphic representation of this conceptual framework.

Figure 2.1 *Conceptual framework for staffing remote rural schools*

Results/New Framework?

Financial Incentives

Targeted recruitment

Forced postings

Others

Rural teacher education

TSC

DPM

Ministry

District officers

Teachers' Unions

BOG

Principal

Teachers

Contextual analysis

Historical analysis

Rural Teacher Shortage

Outcomes

Policy Interventions

Policy Framework

Situational Analysis

The Problem

Chapter 3

Methodology

Introduction

In this chapter, I discuss the research design adopted for the study, the research site and the participants, and the various data collection processes included in the study. Before engaging this core discussion on methodology, however, I will first outline, briefly, my entry into this study in order to contextualize the choice of research design and locate myself within the broad conceptualization of the study.

Entry into the Study

My resolve to stay on and teach in a remote rural school baffled many of my friends. Well, I already told you this! What I had not told you was that my father, a former paramilitary police officer, and a devout Christian, encouraged me to stay on because in his view it was God's will and a good challenge too. "Great leaders cut their teeth in the bush," he would repeatedly remind me. In the five years that I worked in the area, I experienced numerous hardships including poor transport, encounters with snakes, and disease, especially malaria. As well, we had to contend with acute shortage of water, high levels of community poverty, poor housing, and shortage of teaching facilities. Talking of teaching facilities, I recall walking into my first class with great enthusiasm and after greeting the students, asking them to take out their course textbooks. Only two or three students had the book and the rest, the whole forty of them, in a move that appeared well rehearsed, split into groups and congregated around the three.

Momentarily thrown off my stride, I quickly recovered and proceeded with the lesson, after which I made a beeline to the principal's office to complain about the lack of student textbooks. Looking at me with, a mix of pained concern and parental understanding, the principal said, "Musembi, this is a poor school; your students are poor too. You are their text book." There were thrills too. I still relish memories of a most open, friendly, and generous community. Oft times, the villagers – men, women, and even children – would stop to chat with us in the market and by the roadside. They even invited us to their homes for meals and for important family events and even traditional dances!

Ten years later, after completing my master's degree studies, the TSC deployed me to administrative duties at the organization's headquarters in Nairobi. My initial assignment entailed handling teachers' disciplinary cases. Interestingly, many of the discipline cases involved teachers from remote rural schools. I also travelled extensively throughout the country with the TSC disciplinary committee, hearing and determining various teacher discipline-related cases, normally at district headquarters. Many of the discipline issues revolved around absenteeism from duty. The experience of working with the TSC disciplinary committee gave me a front-seat view of some of the contradictions between teacher management policy and the reality teachers' lives in remote rural schools.

A majority of the teachers appearing before the committee had valid reasons why they, for example, exceeded their allocated leave of absence and why they could not get in touch with their school principals to extend their leave.

Having worked in a remote rural school, I found that I could easily relate to the reasons the teachers gave to justify their absence from duty, especially when they had to travel to Nairobi or to the district headquarters to follow up on issues especially dealing with salary delays. Unfortunately, for the teachers, the policy on teacher absenteeism was very clear. The disciplinary committee often dismissed the teachers' explanations as frivolous and went on to mete "appropriate" punishment, usually suspension or loss of salary for the days the teachers missed work. I was frustrated at the apparent disconnect between the policy and the reality of the teachers' stories, and more so at my inability to persuade the other committee members to listen more humanely such stories. Indeed, at one point one elderly member of the committee told me to stop sympathizing with the teachers and act firmly, "like an employer."

Later, I worked as a trainer in the human resources department, a position that afforded me more interaction with the top policy-making machinery of the TSC. I was part of several "fact-finding" teams send by the TSC to various parts of the country to collect information relating to various teacher management issues. On such tours, we would descend on schools in various parts of the country, distribute questionnaires to teachers, and interview some heads of schools. I always felt that such information-gathering exercises barely scratched the surface of the lived reality of teachers' lives since all we asked the teachers to do was tick off questionnaire items. I knew such tools, and our cursory inspection of the schools, only yielded generic information, which, nevertheless, informed policy on teacher management. I always felt that we were missing a big part of the

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picture by failing to, at least, ask the teachers to share in more detail some of their stories.

When I later started teaching at the School of Education, University of Nairobi, I renewed my acquaintance with rural schools, this time round supervising students on their teaching practicum. The experience provided yet another lens to view rural education issues. All these experiences stoked my interest in rural education, particularly the problem of teacher shortage in remote rural schools. The experiences, too, offered me an opportunity to view the issue of staffing remote rural schools from various perspectives and to imagine how such a multiperspectival approach held hope for sound policy on staffing such schools. More importantly, the experiences, particularly my stints as a rural teacher and in the TSC discipline department, made me realize that teachers in remote rural schools had important stories to share with policy makers but, unfortunately, the policy framework was impervious to the necessity, indeed the existence, of such stories.

Research Design

In order to capture the in-depth understandings of the hardships experienced by teachers in remote rural schools in Kenya and the policy responses to such hardships, this study needed a research design that would interrogate both the subjective understandings of hardship as well as the intricacies of policy – both as a social process and a political project. Such a design would focus on "the meanings of policies, on the values, feelings, or beliefs they express, and on the processes those meanings are communicated to and "read" by various audiences"

(Yanow, 2000, p. 14). To such an end, I adopted a critical interpretive research design drawing, selectively, on hermeneutics for the study.

The critical interpretive research design is a qualitative research design that intersects interpretivism and critical theory (Pozzebon 2004). Broadly speaking, there are three categories of qualitative research design, namely, explanatory, interpretive, and critical designs (McNabb, 2010). Critical interpretive research is therefore a bricolage (Denzin & Lincoln, 2008) piecing together interpretive and critical techniques to study complex social problems. Below, I will briefly discuss each of the three constructs framing my research design, namely, interpretive research, critical research, and hermeneutics, highlighting how they interweave vis-à-vis the objectives of this study.

Interpretive research aims at building understanding of a phenomenon through "the systematic analysis of socially meaningful action through the direct detailed observation of people in natural settings and interpretations of how people create and maintain their social worlds" (Neuman, 2000, p. 71). Such meaning making is rooted in the distinction (initiated by Max Weber) between *verstehen* (understanding) and *erklären* (explaining) relating to social reality and natural reality respectively. Such sense making of the world necessarily includes human participation and interaction, thus necessitating a strong sense of connection between the researcher and the participants (McNabb, 2010). Indeed, interpretive research enables the researcher and the participants enter into a dialogue "whose outcome will qualify as something better, if it is only a clearer

shared understanding of what is at stake in the question at hand" (Stivers, 2000, p. 133).

The theoretical basis of interpretive research is that people acquire knowledge through social interactions within specific socio-historical settings. Such interactions happen through language, group consciousness, and shared meanings (Klein & Myers, 1999). Context is therefore an important aspect of interpretive research (McNabb, 2010; Rowlands, 2005). As Rowlands (2005) further observes, meaning is a reflection of the relationship between the researcher and the object of the study, as well as the situational factors that exist at the time. Thus, interpretive research does not test predetermined hypotheses but provides many-layered descriptions and interpretations of reality by examining the way humans make sense out of their experiences. Interpretive research thus attempts to understand phenomena through accessing the meanings that participants assign to them (Rowlands, 2005).

Critical research moves beyond explanation and interpretation to focus on the dynamics of power, knowledge, and ideology that surround social practices (Pozzebon, 2004). Critical theory, traditionally associated with the work of the Frankfurt school (Horkheimer, Adorno, Marcuse, and Fromm), and more lately Habermas, posits that interpretations of social reality and their underlying theoretical assumptions are not neutral but are part of political and ideological conditions (Alvesson & Skoldberg, 2009).

While recognizing the highly developed theoretical formulations of the Frankfurt school and Habermas, I argue, with Pozzebon (2004) that it suffices to

view critique as simply implying "probing taken-for-granted assumptions inherent in the status quo by being critically reflective, while utilizing whatever theoretical framework is chosen" (p. 278). Actually, as Fairclough posits, the term critical theory can be used in a "generic sense for any theory concerned with critique of ideology and the effects of domination, and not specifically for the critical theory of the Frankfurt School" (1995, p. 20). Viewed thus, critical research aims at questioning established social orders, dominating practices, ideologies, discourses, and institutions (Alvesson & Deetz, 2000). More importantly, critical research (also referred to as emancipative or empowering research) aims at helping the participants move beyond surface illusions to uncover, identify, and understand the causes of their circumstances (McNabb, 2008). Such understanding, consequently, helps people change their circumstances by visualizing and building a better world for themselves (Neuman, 2000).

Hermeneutics, defined simply, is the tradition, philosophy, and practice of interpretation (Moules, 2002). The term has roots in the Greek word *hermeneuein*, meaning to interpret and its derivative *hermeneia* meaning interpretation (Crotty, 1998; Demeterio, 2002). To Shwandt (1997) interpretation is, indeed, a synonym for hermeneutics or *verstehen* (understanding). According to hermeneutics, understanding "proceeds from making clear peoples interpretations of their own and others' experiences, leading to the discovery of context-specific meaning" (Yanow, 2006, p. 10). Moreover, hermeneutics foregrounds the importance of interpretive influences such as historicality, culture, and all forms of prejudice (Gadamer 1976). Though initially confined to interpreting religious texts,

hermeneutics has broadened the notion of "text" to encompass many areas of scholarship and to cover what Taylor (1971) calls "text-analogues" (p. 3) including conversations, speeches, legislative acts like voting, and nonverbal communication (Holroyd, 2007; Ricoeur, 1971; Yanow, 2006).

Critical interpretive research, thus aggregated, enables "insight, critique, and transformative redefinition of social reality through surfacing and illuminating spaces and incidences of oppression, injustice, or unfairness, and countering taken-for-granted ideologies, ideas and discourses thus providing managerially relevant knowledge that enables change and new ways of operating" (Alvesson & Deetz, 2000, p. 19). Insight refers to focus on the local – participants, voices, and processes – thus avoiding totalizing thinking. Critique relates to reflection on the relations of power and addresses how cultural traditions and the acts of powerful agents contribute to freezing social reality to the benefit of certain sectional interests at the expense of others. Finally, transformative redefinition refers to opening up the frozen social reality, allowing for political reconsideration and alternative forms of decision-making (Alvesson & Deetz, 2000).

In the context of my study, the critical interpretive design provided a "hybridized analytics of reality construction" (Denzin & Lincoln, 2008, p. 185) with regard to understandings of hardship in remote rural schools. By focusing on the subjective, yet equally important, understandings and experiences of rural hardships by grassroots policy players, the design provided a platform for disrupting the policy process for teacher management in Kenya and the possibility

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to re-imagine the policy architecture. The new imaginary, from the overarching top-down, expert-driven process to a more democratic and inclusive policy terrain, would recognize various participants as the "substantive experts in their own domains" (Yanow, 2000, p. 19).

From a policy analysis perspective, moreover, the critical interpretive design not only surfaced different interpretations (meanings) of policy, but also provided a platform through which the interpretations of underrepresented groups would be heard (Yanow, 2000). This concurs with the observation by Alvesson and Skoldberg (2009) that critical interpretive research stimulates reflection that encourages multiple perspectives. Such multiplicity, in turn, "gives marginalized quieter voices a chance of being heard as well as enhancing the research project's political relevance over a broader field" (Alvesson & Skoldberg, 2009, p. 284). This vision resonates with what Denzin and Lincoln (2008) call the eighth historical phase (moment) in the development of qualitative research. This moment, beginning in 2005, "asks that the social sciences and the humanities become sites for critical conversations about democracy, race, gender, class, nation-states, globalization, freedom, and community" (p. 3).

Finally, the preference for a qualitative research design, generally, was consistent with my epistemological and ontological assumptions. I am an African. I was born and brought up in a small rural village in Eastern Kenya. In my community, the Akamba, communal decision-making, through consensus (Mbiti, 1990) was, and continues to be, an integral part of family, clan, and tribal life. The premium placed on community ensures that despite the presence of clear

hierarchies at the different society levels, there is little probability for sustained privileging or marginalization of certain voices (Wiredu, 1995).

Moreover, I grew up in a story-filled environment, a fact that could explain why stories rather than numbers appeal to me to make sense of the world. As a young boy, I spent many of my evenings with my cousins in our grandmother's hut where, sitting around a blazing fire, she would regale us with stories, riddles, songs, and proverbs. I heard stories, too, from hunters, farmers, beekeepers, men and women visiting with my parents. Even in my junior primary school days, storytelling and singing were a major part of the curriculum. I learnt how to tell stories, and how to listen to stories.

Within this community-centred environment, people define and acquire knowledge intersubjectively in the context of socio-historical realities. Hamminga (2005) says that in African epistemology, stories are never abstract and they always relate to life experiences. As such, utility is the most important attribute of knowledge. This utility energizes both the teller, and the listener – the whole community. Mbiti (1990) uses the analogy of a car battery to highlight this intersubjectivity. On its own, a fully charged battery is of no use, neither is a car without a battery. When connected, the battery and the car become vital forces, each charging and energizing the other.In the context of research, such a position privileges shared meanings between the researcher and the research participants rather than the researcher's objective definitions (Rowlands, 2005).

The Study Site

The main site for this study was Kalamboni secondary school in Makueni district in the southern part of Eastern Kenya. I chose the school purposively for two major reasons. First, the school is in a rural remote area, one of the designated hardship areas and, second, it is a district day (non-boarding) school. Below is a brief description of the types of secondary schools in Kenya, which I provide in order to contextualize the choice of the school.

There are three main categories of secondary schools in Kenya, namely, national, provincial, and district schools. National schools are prestigious, mainly well-funded schools that admit the best students from all over the country. Provincial schools, which are also fairly well funded and staffed, draw their students from their respective provinces. District schools, at the bottom of the pecking order, are poorly funded, staffed, and equipped. These schools typically admit the lesser qualified students mainly from the local school neighbourhood.

A majority of the national and provincial schools, as well as the better district schools, provide boarding for their students. There is a long-held belief among parents and the general populace in Kenya that boarding schools are good since living at the school will raise student motivation and achievement. This is a belief deeply rooted in the history of education in Kenya whereby European missionaries introduced boarding schools to shield students from the heathen ways of African traditional communities (Bogonko, 1992). A study by Thias and Carnoy (1973) did indeed suggest that the availability of boarding intensified exposure to the learning environment and thus contributed to students' academic

achievement. Moreover, boarding schools normally have housing for their teachers thus helping both the teachers and students to avoid long walks to and from school every day thus more time for interaction.

On their part, day schools are generally poor and have fewer students, have poor teaching and learning resources, and generally have no housing for their teachers. Thus, the choice of a district day school was deliberate since such a school represents the typical picture of hardship.

Selection of Participants

The identification of participants for this study was also purposive. The aim was to target participants with experiences and information that would elucidate key understandings for the final report (that I will share with policy makers) in an effort to find policy and practice measures that may help to attract, motivate, and retain teachers in secondary schools in hardship areas in Kenya. Such measures may ultimately lead to a lasting solution to the perennial problem of teacher shortage in such schools. In addition, salient understandings and personal experiences of these individuals highlight how greater attention given to stakeholder participation may enhance policy formulation.

The primary participants in this study were teachers at Kalamboni secondary school. Since the intention was to have in-depth conversations with the selected teachers, I selected five teachers for this purpose. The five, with experiences and traits relevant for the study, included: (a) a beginning teacher, (b) a long staying teacher (more than 5 years), (c) a teacher from the local community

or geographic area, (d) one from a different and distant community, and (e) a teacher intent on transferring from the school.

After obtaining a research permit from the Ministry of Education, I contacted the school principal and set up a date to visit the school, discuss the study, and seek approval to conduct the study at the school. The principal also arranged for a meeting with all his teachers during which I explained the nature, purpose, scope, and tentative dates of the study. At the meeting, I also sought for volunteers for the study. From this initial meeting, three teachers volunteered for individual interviews. Following a group discussion involving all the teachers a few days later, two more teachers volunteered for individual interviews, bringing the total to five. This was adequate since I had proposed to have between three and seven teachers for the individual discussions. More importantly, the five volunteers fit the experiences and traits I was looking for.

Besides the teachers, other participants at the school level included the principal, the deputy principal, and the Parents Teachers Association (PTA) chair. The school principal, besides being a teacher and administrator, is also secretary to the school Board of Governors (BOG). Both the Board of Governors and the Parents Teachers Association are important stakeholders in the school since they now wield more policy related power following the introduction of decentralized teacher recruitment and management.

Other participants included the District Education Officer (DEO), the District Human Resource Management Officer and officials of the local chapters of the Kenya National Union of Teachers (KNUT) and the Kenya Union of Post

Primary Education Teachers (KUPPET). All these officers have important roles to play with regard to teacher recruitment, deployment and welfare at the district level. I intended to talk to the Secretary-General of each of the teachers' unions since they deal more closely with teacher issues on a daily basis and they interact more with the schools. Interestingly, when I went for the appointments, the KNUT Secretary-General came with his treasurer while his KUPPET counterpart brought his entire executive committee. The union officials told me that they had decided that this was a very crucial study involving the welfare of their members thus their desire to involve more officials in the conversations. This was both a humbling and affirming gesture for me. The ensuing discussions with each of the groups turned out to be very engaging, detailed, and revealing, a dynamic that may not have been achieved with my initial plan to talk to only one official.

The use of purposive sampling in the selection of the participants, despite its representational limitations, was appropriate for this study. As a qualitative study, the thrust of this study was not representativeness but depth of information (Marshall & Rossman, 2006). Purposive sampling served this purpose adequately by targeting participants who had characteristics relevant to the research problem (Wiersma, 2000), in this case teachers and other grassroots policy stakeholders who could speak to the experiences of hardship that the study sought. Purposive sampling, moreover, increases the scope of range of data exposed (Lincoln & Guba 2008) by teasing out the more deviant cases (Patton, 1990). In this study, such breadth of scope was achieved by targeting a wide range of characteristics to identify the participants especially for the in-depth conversations. The increased

scope of data, according to Strauss and Corbin (2008), allows the study to maximize "opportunities to develop concepts in terms of their properties and dimensions, uncover variations, and identify relationships between concepts" (p. 143).

Data Collection Procedure

Primary data for this study were collected through individual interviews and group discussions. At the school, I had a focus group discussion involving all the 12 teachers, including the principal, in the school staff room. The discussion lasted 80 minutes and provided a good entry point for me to get to know and interact with the teachers in general before embarking on individual interviews. The discussion also allowed for teachers not participating in the individual discussions to contribute to the study. Moreover, the discussion surfaced themes I had not anticipated. Such themes provided more depth not only in the group discussion, but also in the individual conversations.

Following the group discussion, and the identification of the five teachers for the individual conversations, I had a meeting with each of them to agree on the location and timing of our meetings. I had envisioned engaging with the selected teachers for an extended period within one school term, about three months, preferably for one hour once per week. Eventually, we settled on four meetings, each lasting a maximum of one hour, with each of the five teachers. At the end of each discussion, I would agree on the timing and venue of the subsequent meeting with each teacher. I thus held conversations with the five teachers at various locations including the school laboratory, under the shade of two huge mango

trees on the school compound, at a teacher's residence, and once in my car. The important element here was to have an environment where the individual teachers could share their stories in a relaxed manner.

I met with the school principal, deputy principal, and the PTA chair at the school. My conversations with the school principal and his deputy took place in their respective offices while my meeting with the PTA chair took place in one of the classrooms. The discussions with the district education officials, as well as the teachers' unions' officials were in their respective offices. Each of these interviews lasted between 60-90 minutes. All the discussions with the participants were audio recorded. Additionally, I took notes during the conversations and during my walk-about in the school.

I supplemented the information gathered through the conversations at the school by researcher observation. My extended stay in the school, over two months, enabled me to have an in-depth understanding of the school. In the process, I was able to interact with the teachers both formally and informally – in the staffroom, in the offices, in the playing fields, in their classes, and even after school hours.

I collected other data relating to policy on teacher recruitment, retention, and motivation through the review of relevant policy documents at the Teachers Service Commission (TSC) and at the Directorate of Personnel Management (DPM) offices in Nairobi. At the TSC, I reviewed documents relating to staffing of secondary schools, including Staffing Returns and policy documents relating to decentralized teacher recruitment. At the DPM, I reviewed policy documents

relating to the posting of civil servants and teachers to hardship areas. I also reviewed documents detailing government efforts to name and delineate hardship areas as well as to attract and retain civil servants and teachers in such areas.

Instrumentation

I used a semi-structured interview guide (see appendix D) to guide my conversations with each of the various research participants. The interview guide contained core questions that I endevoured to cover in the course of each interview. For my extended engagement with the five teachers at Kalamboni secondary school, the interview guide acted more as a broad guideline for the issues I pursued with the teachers. Each conversation surfaced issues that I pursued further, and/or reformulated, as the conversations moved in different trajectories following each interview. I audio recorded all the interviews and endevoured to transcribe each interview the same day, usually in the evening, following each interview.

Data Analysis and Presentation

Through thematic analysis, data were coded and categorized according to patterns and emergent themes related to the purpose of study and research questions (Berg, 2009; Merriam, 1998). The analysis involved gleaning meaning from the data based on the interviews, review of documents, my observations, as well as from themes in the literature. The analysis also benefitted from member checking which involved sharing some of my interpretations with the various participants. Besides serving as a check for trustworthiness, the member check also enabled me to get other analytical perspectives from the participants for, as

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Connelly and Clandinin (1990) observe, "research is a collaborative document, a mutually constructed story out of the lives of both researcher and participant" (p. 4).

In subsequent chapters on the findings and discussion of the findings, I present, interpret, and analyze the data thematically, in light of the research questions. I have also used thick descriptions to map the research field, different aspects of the study, and the interactions with the various participants. Where appropriate, I have also used direct quotations to foreground the voices of the participants.

In the remainder of this chapter, I discuss the ethical considerations for the study, the limitations and delimitations of the study, and the trustworthiness criteria for the study.

Ethical Considerations

This study was conducted in accordance with the University of Alberta ethical guidelines for human research. Once the relevant university authority gave ethics approval, I obtained a research permit from the Ministry of Education in Kenya. I thereafter contacted the district education office, branch offices of the two teachers' unions, and the school principal and explained the purpose and nature of the study. I invited the District Education Officer, the teachers' union branch Secretary-Generals of the two teachers' unions, the school principal, the school PTA chair, and the schoolteachers to volunteer for the study and to give written consent to become individual interview participants. A letter outlining the purpose and nature of the research was send to the participants following the

initial meeting. Enclosed with the letter was a consent form for each participant to sign. The letter and the consent form clearly spelt out that participation in the study was voluntary and that the participant was free to opt out of the study at any point without penalty, harm, or loss (see appendices A and B for samples of the letter and consent form send to the participants).

Trustworthiness Criteria

The value of any research is in the trustworthiness of the study's findings (Marshall & Rossman, 2006). Lincoln and Guba (1985) pose four questions which delineate the criteria for establishing the "truth value" (p. 290) of a study. First, how credible are the particular findings of the study? Second, how transferable and applicable are the findings to another setting or group of people? Third, how can we be sure that the findings could be replicated were the study to be carried again with the same participants in the same context? Fourth, how can we determine that the findings are a true reflection of the participants' views and not a fabrication of the researcher's opinions and biases? In this study, I adopted the four criteria for trustworthiness of qualitative research suggested by Lincoln and Guba (1985), namely, credibility, transferability, dependability, and confirmability.

Credibility.

The credibility value of a study speaks to the accuracy in the identification and description of the various research variables and processes. Janesick (2003) reaffirms this position when she says, "the description of persons, places, and events has been the cornerstone of qualitative research" (p. 69). The inquiry

therefore, as Lincoln and Guba (1985) argue, must be "credible to the constructors of the original multiple realities" (p. 296). In my study, I ensured this through triangulation, prolonged engagement, member checks, and in-depth description of the research site, participants, and processes.

Triangulation, as used in the social sciences, reflects an attempt to reach an in-depth understanding of the phenomenon in question (Flick, 2009). Denzin (2009) identified four types of triangulation, namely, (a) data triangulation, which involves the use of variety of data sources, (b) investigator triangulation, which involves the use of several different researchers or data evaluators, (c) theory triangulation, which involves the use of multiple interpretive perspectives, and (d) methodological triangulation, which is the use of different methods in the study. This multiperspectival approach to data collection and analysis resonates with what Richardson (1994) and Janesick (2003) call crystallization. Within this analogy, the image of the crystal replaces the land surveyor and the triangle (Janesick, 2003). As Richardson (1994) explains, crystallization is recognition of the multifaceted nature of the social world. The crystal "combines symmetry, and substance with an infinite variety of shapes, substances, transmutations, multidimensionalities, and angles of approach. Crystals grow, change, and alter, but are not amorphous" (p. 522). Our view of the crystal depends on how we hold it in relation to the light. As such, as Richardson further explains, "crystallization provides us with a deepened complex, thoroughly partial, understanding of the topic. Paradoxically, we know more and doubt what we know" (p. 522). Janesick (2003) views the crystallization metaphor as an opportunity for qualitative

researchers to "incorporate the use of other disciplines, such as art, sociology, history, dance, architecture, and anthropology to inform our research processes and broaden our understanding of method and substance" (p. 67). As such, the work of a qualitative researcher becomes a work of bricolage, or, as Denzin and Lincoln point out, "a reflexive collage or montage, a set of fluid interconnected images and representations...a quilt, a performance text, a sequence of representations connecting the parts to the whole" (2008, p. 8). For purposes of this discussion, I stick with the more familiar term, triangulation, but with the more expansive meaning of crystallization as discussed by Richardson (1994) and Janesick (2003).

In my study, I ensured the triangulation element through collecting data from various sources. This included interviewing various categories of participants (who were identified purposively), researcher observation, literature review, and document analysis. I also shared some of the stories and my interpretations with the participants. This member check, according to Lincoln and Guba (1985), also enhanced the credibility of the inquiry. For the member check with the individual teachers, I brought a summary of my interpretations from the previous discussion to the subsequent interview. This served a two-fold function. First, it enabled each participant to review the material and respond to the accurateness of the interpretation, and, second, it enabled further clarifications and discussion. For the one-off interviews with school administrators, teachers' union officials, and district education officials, I took summaries of my interview interpretations to their offices for them to look through.

With regard to the credibility of personal stories from individual

interviews, Connelly and Clandinin (1990) talk about verisimilitude, which Guba

(1981) calls isomorphism, between the data of an inquiry and the phenomena

those data represent. This essentially entails an attempt to ensure that the stories

are "plausible," "authentic," and "adequate" (Connelly & Clandinin, 1990, p. 8).

The long engagement with the participants, in particular the teachers, was an

attempt in this regard. Moreover, I have endeavored to include in-depth

descriptions of participants, research sites, and research processes. Marshall and

Rossman (2006) posit that an in-depth description showing the complexities of

processes and interactions ensures that the data derived from the setting is valid.

Transferability.

Lincoln and Guba (1985) define transferability as applicability or the

degree of fit between two contexts. In qualitative research, which is largely

subjective, this calls for a thorough understanding and description of the

phenomena and the context under study. Even though it is impossible to replicate

context (McNabb, 2008), the experiences presented could describe the

experiences of other people in similar circumstances elsewhere. This is what Van

Manen (1990) refers to as plausibility, or the "ah-ha" moment, the familiarity of

an account of a lived experience. In my study, I ensured the capturing of lived

experiences through the purposive choice of participants, particularly grassroots

policy stakeholders. Furthermore, I also used thick descriptions, detailed

narratives, and direct quotations. Finally, stating the theoretical parameters of the

study enhances transferability (Marshall & Rossman, 2006). To this end, I have

outlined the theoretical and conceptual thinking guiding this study in the previous chapters.

Dependability.

Dependability is synonymous with validity, stability, and consistency in quantitative research. In qualitative inquiry, however, the notion of stability is problematic since the field of inquiry is not only subjective but also "time and situation specific" (McNabb, 2008, p. 277). Nonetheless, Guba and Lincoln (1989) suggest that the researcher can enhance dependability through triangulation and keeping an audit trail. I have already explained how I ensured triangulation. With regard to the audit trail, I audio recorded all the interviews, took field notes to supplement the recorded conversations, and used member checking to confirm the accuracy of my interpretations.

Confirmability.

Confirmability speaks to the issue of both data and interpretational neutrality (Guba, 1981). Besides triangulation, which I have elaborated upon in this chapter, Lincoln and Guba (1985) suggest reflexivity as a step that qualitative researchers can take to enhance neutrality. Reflexivity entails revealing one's epistemological assumptions, which bear on the way one formulates the research questions and on the way that one analyses and presents the data. In the previous chapter, I discussed my epistemological and ontological orientations, which foreground interaction and dialogue in the definition and acquisition of knowledge. Moreover, I also described my work as well as personal experiences that also influenced the nature of this study. Finally, the debriefings that I had

with my supervisor and the supervisory committee, as well as feedback from presentations at scholarly conferences and journal article reviews helped to tease out some of the more obvious biases.

Closely aligned to the four criteria by Lincoln and Guba (1985) of determining the trustworthiness of qualitative research in general, Alvesson and Skoldberg (2009) propose four trustworthiness criteria specific to critical interpretive research. These criteria are authenticity, plausibility, reflexivity, and criticality.

Authenticity, plausibility, and reflexivity relate to Lincoln and Guba's (1985) credibility, dependability, and confirmability, respectively, and refer to the findings being genuine to the field experience. For Alvesson and Skoldberg (2009), an important question, in this regard, is whether the findings are "genuine or fictitious" (p. 115). Accordingly, the researcher must demonstrate evidence of interaction with the empirical material (e.g., presence in the field), sound interpretation, and declaration of personal biases in text production and language use. As discussed previously, I have addressed these criteria through thick descriptions of the study site and participants, use of direct quotations, and reflection on my epistemological and ontological orientations.

Criticality, according to Alvesson and Skoldberg (2009), refers to the re-examination of taken for granted "assumptions, established ideologies, various kinds of power relationships, and institutions" (p. 159). This is not necessarily a negative view of society and its institutions, but an endeavour based on "an emancipatory cognitive interest" (Alvesson & Skoldberg, 2009, p. 159) to furnish

new alternatives for social action. In this study, I have addressed this criterion by questioning the policy understandings of rural hardships, surfacing other understandings and experiences of such hardships by focusing on grassroots voices, and suggesting an alternative policy approach to the problem of attracting and retaining teachers in remote rural schools in Kenya.

Limitations of the Study

The decision to delimit my discussions to teachers and other grassroots policy stakeholders is, potentially, a limitation for purposes of policy. This is because such data excludes input from senior policymakers in government, particularly in the Ministry of Education, TSC, and the DPM. However, the thrust of this study was to surface those otherwise marginalized grass root voices and experiences.

The other potential limitation of the study is with regard transferability of the findings to other contexts. Granted, the study was done with utmost rigour, with particular attention to trustworthiness criteria as detailed in the previous section. However, as is with all qualitative research, the interpretations and meanings are still subjective and context-based. Researchers seeking to transfer the conclusions of this study to other countries/contexts, and time periods should do so with caution.

Delimitations of the Study

The choice of the site, as well as the participants of this study was on purpose to capture the in-depth lived experiences of teachers and other grassroots policy stakeholders in a hardship area. The decision, too, to carry out a qualitative

study, was deliberate in order to surface experiences and views that are largely absent or marginalized in policy discussions. I realize that the downside to imposing these parameters on the study is that the findings may not offer sufficient grounds to influence policy with regard to the welfare of teachers in hardship areas. However, I am confident that the findings could open an interesting framework offering more inclusive policy spaces. More importantly, at the practice level – in schools, at the district education offices, and even in the individual offices at the TSC – the findings provide an entry point for the various officers to treat, and to engage, teachers in hardship areas more humanely.

Summary

In this chapter, I have discussed the study's research design, study site, selection of participants, as well as the various data collection processes. I have also outlined the study's strengths and limitations. In the next chapter, I will present the findings of the study. The findings, relating to the research questions, highlight the shared understandings arising from my conversations with the various participants.

Chapter 4

Findings of the Study

Introduction

The purpose of this chapter is to present the findings of the study. The findings relate to the four key areas addressed by the study, namely, experiences and understandings of hardship as it relates to the work of teachers in remote rural schools in Kenya, the measures taken for addressing those hardships, the views of various stakeholders regarding those measures, and suggestions for attracting and retaining teachers in hardship areas. The findings are, largely, a reflection of the shared understandings arising from my conversations with the various participants. Before embarking on the various conversations, however, I will first describe the school where the study was located and the teachers who participated in the individual interviews in order to, I hope, draw a mental graphic to assist readers to locate themselves in the conversations. For purposes of confidentiality, the names of the school, as well as the names of the individual teachers, are fictional.

Kalamboni Secondary School

A trip to Kalamboni secondary school, located in the heart of Makueni district, offers a singular experience. As you descend from the lush green, cool, and picturesque Kalama hills that mark the border with Machakos district, the temperature rises suddenly, bringing with it waves of dry and suffocating heat. The land is suddenly bare, miles upon miles of rolling flat land with sparse thorny vegetation and a few baobab trees accounting for the scarce greenery. Several

market centres dot the road, all teeming with young girls and elderly women shouting and hustling to sell various edibles – mainly cassava, pawpaw, and roast maize – to equally excited passengers in buses and *matatus* (mini-buses). Along the road, you will also encounter endless herds of donkeys, with young boys and girls trotting behind them in their daily search for water from the few seasonal rivers in the area. Your first thought is that these children should be in school. True, but then fetching water for their families, sometimes from as far as 20 kilometres away, is a higher priority. The faraway look in their eyes as they stare into the clear blue sky, as if searching for a small cloud that might herald the onset of rains, and ease their water forays albeit temporarily, betrays a curious absence of the usual sparkle and buoyancy of youth. Obviously, life must be harsh, even for these young children, in this small remote and dry village in rural Makueni, I think to myself as a group of children point me in the right direction to Kalamboni secondary school where I have an appointment with the school principal.

Generally, Makueni district is one of the driest regions in Kenya, receiving an average of 500mm of rainfall per year. High temperatures, ranging from 20°C-30°C result into high evaporation. The rainfall is unreliable and the people mainly depend on water from pans sunk in the beds of the few seasonal rivers and streams in the area. Consequently, the district experiences frequent droughts and famine. Except for a few hilly areas with over 400 persons per square kilometre, the district is sparsely populated, with an average population density of 96 people

per square kilometre. The district is also one of the poorest in Kenya, with poor people constituting over 70% of the total population (Republic of Kenya, 2005).

Standing on a dry ridge at the end of a dusty narrow road, more of a cattle track really, and surrounded by a live fence of thorny bushes, with two sturdy baobab trees standing guard just beyond the gate, is Kalamboni secondary school. The school comprises four fairly well built classrooms that stand in as single straight block facing the entrance. A smaller dilapidated house, with the inscription "Administration Block" on its whitewashed front wall, stands on the right before you get to the classes. The administration block houses the offices of the principal, deputy principal, school accounts clerk, as well as the staffroom. Between the administration block and the classes is a semi-permanent unfinished building that serves as a kitchen for preparing lunch for the students and the teachers. Behind the administration block is a semi-permanent pit latrine for the teachers. The school has no latrines for the students and they have to share latrines with the pupils in the neighbouring primary school across the field. To the south of the classrooms is an incomplete building that is the school laboratory. The laboratory serves the whole school for all the science subjects, namely, physics, chemistry, and biology. Two large water tanks, one at each end of the classrooms block, complete the inventory of the school's physical assets.

In the school front yard, two large mango trees, stand proudly in front of the classes, providing much needed shade for the students and teachers from the searing afternoon heat. The trees also provide parking space for bicycles belonging to the students and teachers, as well as for the principal's motorcycle.

Moreover, the school holds its assemblies under the two mango trees every Monday and Friday mornings. Between the two trees is a wooden flag post with the Kenyan flag flying stoically in the wind, as if affirming to any doubters that this school, indeed this region – dry, remote, underdeveloped and all – is a part of independent Kenya.

Kalamboni secondary school is a mixed day secondary school. This means that the school caters for both boys and girls and does not provide boarding to the students. The local community, in conjunction with a local church, started the school in 1997 on *harambee* (self-help) basis. Currently the school has 403 students and 12 teachers. The school, by any standards, is still small, poor, and faced with many challenges.

The Teachers of Kalamboni

I had the opportunity to hold lengthy individual conversations with the school principal, the deputy principal, and five teachers. Below is a short description of each of these participants.

Mr. Kivala

Mr. Kivala, the principal of Kalamboni secondary school is an elderly teacher whose slight built and easygoing manner betrays little of his real age and vast experience as a teacher. His entire teaching career, spanning three decades, has been in schools in remote rural areas and so his self-description, jokingly, as a veteran of hardship areas was not really a joke. Before coming to Kalamboni, Mr. Kivala served as a class teacher, games master, head of department, and deputy principal in his previous postings at two different schools. Mr. Kivala became the

principal of Kalamboni secondary school in 1997, a few months after its establishment. As such, he has played a key role in its development over the years. Indeed, he described himself as having brought up the school from its infancy against many odds.

Mr. Naibu

Mr. Naibu, the deputy principal, has been a teacher for 20 years, 19 of which he has served in various administrative positions in several schools. His experience working in a hardship area was only the one year he had been at Kalamboni secondary school. In our conversations, Mr. Naibu came across as a thoughtful and very patient educator. Owing to his relatively short stint in a hardship area, he did not have extensive personal experiences to share. Nevertheless, he brought an interesting perspective to the discussion particularly with his observation that he found Kalamboni a lesser hardship area than some of the other areas he had worked in which were not classified as hardship areas.

Mrs. Jimmy

A mother of two, and one of the only three female teachers in the school, Mrs. Jimmy became a teacher in 2003 and Kalamboni secondary school was her first posting. She is also the head of the languages department in the school. My encounter with Mrs. Jimmy was rather interesting. First, she was about eight months pregnant, which added an interesting spin to our conversations on hardship. Moreover, she had a very heavy workload and a young son to take care of and as such was pressed for time. We therefore had to squeeze in our conversations during the school lunch hour or in between her classes. Given the

scarcity of rooms in the school, we often had to meet under the mango trees in the school assembly ground. Second, Mrs. Jimmy was one of only two teachers who had willingly chosen to work in this rural school.

Mr. Kisau

Trained to teach physics and chemistry, Mr. Kisau started teaching in 1993 and taught in two other schools prior to his posting to Kalamboni. Mr. Kisau, who started teaching at the school in 1999, is one of the longest serving teachers at the school. The school principal described Mr. Kisau as a very committed science teacher who had single-handedly canvassed the school board and the school community to prioritize the construction of a school laboratory. A widowed father of two girls aged eight and six, Mr. Kisau stated that he was in very good terms with the community around the school and that despite the area being a hardship zone and far from his home, he felt at home and did not intend to transfer from Kalamboni.

Mr. Thomas

A relatively new teacher, with only five years teaching experience, Mr. Thomas lives away from his family who live at his home about 40 kilometres from the school. His young wife is also away from home most of the time as she is a student at a teachers' training college. This leaves their two children, aged four and two, in the care of his aging parents. For this reason, therefore, Mr. Thomas has been intent on transferring to a school nearer his home in order to he attend to his children. Moreover, Kalamboni secondary school was not his

preferred choice but it was where he found employment after failing to get employment at schools of his choice.

Mr. Kitanga

Mr. Kitanga, a teacher with over 10 years experience, and another self-confessed "veteran" of teaching in hardship areas, presented a unique experience since for him Kalamboni was home. Born in the village neighbouring the school he attended the local primary school then proceeded for his high school education in a different district. After completing his university studies, he worked in two other schools, also in hardship areas, before transferring to Kalamboni secondary school. At the time of the study, Mr. Kitanga was also pursuing a graduate degree in educational psychology at one of the public universities.

Mr. Njuguna

Mr. Njuguna came to Kalamboni six years ago and for all the years he has been a teacher in the school, he has been the only one from a different ethnic group. Indeed, Mr. Njuguna has spent all his 16 years of teaching in schools in Makueni and thus away from his family, home district, and ethnic community. Mr. Njuguna told me that since he started working in Makueni, he has been seeking, in vain, to transfer to a school in his home district. At one point, Mr. Njuguna got study leave to pursue a course in entrepreneurship, a course that he did not actually need, hoping to convince his employer to post him to a school of his choice after the study leave. Unfortunately, the ruse did not work and Mr. Njuguna ended up back at Kalamboni secondary school.

In the following section, I will present the findings of the study. The findings are presented thematically.

Views and Experiences of Hardship

Official definitions and understandings of hardship

The issue of hardship as it relates to teachers and other public officers working in remote rural areas in Kenya has been of interest to the Government of Kenya for a long time. Several initiatives to tackle the recurrent problem of attracting and retaining teachers and public officers to remote rural areas have been initiated and coordinated by the Directorate of Personnel Management (DPM), the government department that deals with personnel policy issues for all government departments. A review of policy documents at the DPM revealed that the issue of government officers and teachers shunning postings to certain remote rural areas dates back to pre-independence times. The review also revealed the criteria used by the DPM to define and determine hardship areas. The criteria include: (a) availability and accessibility of food, (b) availability and accessibility of quality potable water, (c) climatic conditions, (d) availability of basic social services and amenities, and (e) transport and communications services (DPM, 2008).

Following these criteria, the DPM designated the following areas as hardship areas for all public servants: North Eastern Province, Isiolo, Lamu, Marsabit, Samburu, Tana River, West Pokot, Turkana Districts, North Division of Baringo District, Laikipia, Makueni, and Keiyo Districts, Manyani Prison Camp and Tinderet division of Nandi district. However, owing to the fact that teachers

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tend to work in more remote areas than the other civil servants who normally

work at district and divisional headquarters, the government allowed the Teachers

Service Commission (TSC) to gazette additional hardship areas for teachers. This

was because of the recommendation by the Teachers Service Remuneration

Committee (TSRC), the body that advises the Minister of Education on issues

relating to teachers remuneration, as part of the 1997 Collective Bargaining

Agreement between the TSC and the Kenya National Union of Teachers (KNUT).

As a result, the TSC currently has 36 gazetted hardship areas while the rest of the

Public Service has 15.

Since 1997, there have been several efforts to harmonize the designated

hardship areas and hardship allowance rates for civil servants and teachers. In

2003, the government constituted an inter-ministerial task force to perform this

task. The task force visited various districts and developed a matrix where they

classified the areas as "extreme hardship," "medium hardship," and "low

hardship" (DPM, 2008, p. 2). In 2005, the government formed another task force

to review the recommendations of the first task force. The Permanent Public

Service Remuneration Review Board (PPSRRB) reviewed the recommendations

of the two task forces in 2006 and felt that the task forces had failed to address the

issue of hardship areas and hardship allowances comprehensively. Consequently,

the government formed a third task force to look further into the issue of hardship

areas. The task force's mandate was to: (a) develop criteria for definition of

hardship areas, (b) undertake field visits to identify hardship areas based on the

criteria, (c) make recommendations for developing and transforming hardship

areas, and (d) recommend incentives and/or allowances for public servants

working in the areas classified as hardship and work out the financial implication.

The task force developed weighted criteria for defining hardship areas as

summarized in table 4.1 below.

Table 4.1 *Criteria for Weighting Hardship Areas.* (Adapted from DPM, 2008)

	Criteria	Weight
1.	Non/limited availability and accessibility of food	25
2.	Non availability/limited access to potable water	20
3.	Non/inadequate transport and communication services	20
4.	Non/limited availability of social services and amenities	25
5.	Harsh climatic conditions	20
6.	Insecurity and high possibility of security threat	5
7.	Poverty index	5
	TOTAL	**100**

The team visited the areas previously classified as hardship and, based on data gathered through observation, interviews with teachers, public servants, and government administrators, aggregated the weighted scores for the areas under consideration. A cut-off point of 55 points for determining a hardship area was agreed on.

A history of hardship

Listening to Mr. Kivala recount the history of Kalamboni secondary school, how he and a few members of the community struggled against many odds to bring up the school from its infancy, it becomes clear that hardship does not just relate to social, geographical, and climatic conditions, as emphasized in the DPM definition, but that it has political and historical dimensions too.

I came to this school in 1997. The school was just starting. It had started as a harambee school in February and I came in July. The school had 10 pupils and two high school leavers as teachers. The school had virtually nothing – no flag, no bell, no classrooms, and no laboratory. This office was a neglected teacher's house for the primary school. Indeed this was the whole schoolhouse. We immediately embarked on fundraising to construct at least two classrooms.

Kalamboni secondary school is an illustration of the hardships faced by certain communities in the quest to provide an education for their children, and of the uneven policy terrain regarding the government's commitment to equitable provision of education, marked by regional disparities in access to good quality (well staffed and equipped) schools and educational services.

Such realization occasioned the deputy principal, Mr. Naibu, to wonder whether it was right to refer to areas such as Kalamboni as hardship areas. His contention, roundly supported during the focus group discussion, was that a more fitting description would be marginalized areas. His argument was that the term hardship tended to blame nature for the problems of such areas, and was thus mis-

recognition of the true cause of hardship, namely, political and administrative ineptitude.

Administrative hardships

The running of schools in hardship areas is, according to Mr. Kivala, an administrative nightmare for school principals. The bigger, well-established provincial schools have more students and therefore a more stable financial base.

Running a small poor school like this is an administrative nightmare. Our financial base, which is mainly dependent on tuition fees, is very weak since we have only about 400 students. Moreover, many of the students pay their fees very poorly owing to family poverty. We have huge debts owed to construction workers, carpenters, and suppliers of stationery, building materials, and sports equipment. Bigger schools with thousands of students and financially well-off parents do not undergo the same hardship.

As Mr. Kivala quickly learnt, to his dismay, the community's enthusiasm and demand for the establishment of a secondary school did not translate into equally enthusiastic ability or willingness to contribute financially to the construction of the school. A fundraising effort aimed at collecting 200,000 shillings to put up two classrooms raised only 3000 shillings. Mr. Kivala further pointed out that unlike schools in more advantaged areas that have influential BOGs to mobilize the community and donors for financial support, poor rural schools face the extra hurdle of constituting their BOG in the first place.

Composing a BOG is a huge problem. The prominent people who should serve on the BOG live in Nairobi and other big towns and they are not keen to be associated with a poor rural school. As a starting point, you have to do with the locally available people who may not be very resourceful.

Besides the shortage of finances and educational facilities, a shortage of teachers is a perennial problem for school principals in hardship areas. Records at the TSC show that the country has a shortage of 23, 291 secondary school teachers, with schools in hardship areas enduring the most shortage. Mr. Kivala revealed that lack of teachers in certain subjects, sometimes for a whole year or more, was common. In such cases, the principal has to devise strategies to have the subjects taught. One such strategy is to request teachers to take an extra load, often entailing teaching subjects outside of their specialization.

Shortage of teachers is another major administrative hardship here. We have often had to resort to employing untrained teachers; usually university students during their long holiday breaks. Sometimes we are not able to find such teachers and therefore some subjects are without teachers for lengthy periods. Given the circumstances, we do not enjoy the luxury of teaching our specializations. I, for example, teach math and geography but I have had to teach physics and Business Studies sometimes. Teaching subjects that a teacher is not qualified to handle is a disservice to the students, but sometimes it is our only option.

Administrative problems faced by schools in hardship areas are not limited to school principals. The district education officials, too, have their share of problems. A particularly thorny issue, according to the District Education Officer (DEO) relates to the definition of hardship areas and especially with regard to border areas. For ease of administration, the government relies on the provincial administrative boundaries to demarcate hardship areas for teachers. This has created all manner of problems. The DEO cited the case of one division, Kalama, which was previously in Makueni district but later became part of a neighbouring district, which is not a hardship area. Besides losing their hardship allowance, the affected teachers had to refund the hardship allowances that they had received previously. This has led to a protracted dispute between the teachers and teachers' unions on one side, and the ministry of education and the TSC on the other. The DEO highlighted the problem as follows:

> *In fact, Kalama is a hardship area but because it is now administratively in Machakos district, it is no longer in the list of hardship areas. This de-motivated the teachers since they lost their hardship allowance and they were even required to refund the allowances they had enjoyed previously. This is a big administrative problem between the teachers' unions and us. We are now having problems retaining teachers in border area schools since they want to move to schools further from the borders lest a similar fate befall them.*

Moreover, many teachers in the border areas are always flocking to the education offices seeking for transfer to the side of the boundary where they can

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enjoy the hardship allowance. The District Human Resource Management Officer amplified this point, further arguing that many teachers and local education officials, too, failed to see the rationale of limiting the demarcation of hardship areas to political boundaries:

> *Teachers in Kalama feel that they were short-changed. I know of a school principal who retired with an overpayment of 300,000 shillings, almost his entire pension, arising from the hardship allowance. The teachers do not see why an administrative boundary, in this case a road, should determine who earns hardship allowance or not. Those who moved to Machakos district keep coming here seeking for transfer back to Makueni district.*

The DEO also pointed out that differences in allowances received by teachers and civil servants were creating yet another administrative hardship for her office. The DEO, as well as the education officers are civil servants employed by the Public Service Commission. Whereas teachers receive hardship allowance at the rate of 30% of their basic salary, civil servants in hardship areas receive only a maximum of 1200 shillings, far much lower than the lowest allowance received by teachers. According to the DPM,

> While other Public Service organizations pay hardship allowance ranging from Kshs.600 to Kshs.2, 500 per month, the major disparity is in the Teaching Service where the hardship allowance is paid at 30% of an officer's basic salary without any ceiling and irrespective of marital status. The rate ranges between Kshs.3, 055 and Kshs.13, 497 per month. The Civil Service pays hardship allowance at the rate of 30% of basic salary,

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but subject to a maximum of Ksh.1, 200 p.m. for married officers and Ksh.600 p.m. for single officers. (2008, p. 2)

Moreover, some of the areas designated as hardship areas for teachers are not so for civil servants. According to the DEO, Such discrepancies, have led to frustration and grumbling among the education officers and could tempt the officers to engage in corrupt practices to bridge the salary gap with the teachers.

There is also the disparity between the hardship allowances received by the civil servants and those received by the teachers. Teachers receive more than our educational officers do yet they are working under similar hardships. This could tempt the education officers to engage in corrupt practices to bridge the gap with teachers.

An interesting finding was that, indeed, the Teachers Service Remuneration Committee, the body mandated to advise the Minister of Education on hardship areas for teachers, created the confusion over the definition and demarcation of hardship areas. The Kenya National Union of Teachers branch secretary, who was a member of the committee, narrated how political meddling, as well as selfish interests, compromised the committee's work.

Politicization of the process of determining hardship areas began a long time ago. In 1997, the Teachers Service Remuneration Committee (TSRC) came up with a list of hardship areas and hardship allowance rates. The then Minister for Education insisted that for him to ratify the document, his constituency, a very rich area, had to be included in the list of hardship areas. Members of the TSRC then included their home regions in

the list too. That was how we came up with a list of 36 hardship areas for

teachers. The Directorate of Personnel Management is only coming in

belatedly to sort out the mess that the TSRC and the Minister created.

Even then, the DPM criteria for determining hardship areas are very

general and prone to manipulation by administrators and politicians.

Officials of the Kenya Union of Post Primary Education Teachers
(KUPPET), too, felt that the whole issue of defining and demarcating hardship
areas was an administrative fiasco owing to the politicization of the process. The
union chair summed up the opinion of the members as follows:

The government views hardship politically. The Directorate of Personnel

Management should have free rein in the Gazetting of hardship areas.

Unfortunately, this is not the case as the process is overly politicized and

politicians now determine the hardship areas. To clean up the whole

process is now very difficult.

Bruised professional pride and dignity

Schools in hardship areas in Kenya are generally poor and poorly
provisioned. This reality is a testimony to the acute levels of community poverty
in many of the remote rural areas in the country. From my conversations with the
teachers at Kalamboni secondary school, it emerged that school poverty,
evidenced by poor teaching facilities and shortage of furniture, among others,
made a dent in the professional pride and dignity of the teachers. Interestingly, all
the teachers I spoke to singled out the staffroom as a bruise to their professional
image. Indeed, three of the teachers, Mr. Kisau, Mr. Njuguna, and Mr. Kitanga

remembered the staffroom as one of the things that struck them most when they first arrived at the school:

> Mr. Kisau*: ...the staffroom was not any better. All the teachers were seated behind one long table in a row, on chairs that were very old.*

> Mr. Njuguna: *The first thing that struck me on my first day here was the staffroom. A poorly constructed and maintained structure, the staffroom did not appear to be a serious work place. The teachers were using old, poorly constructed desks, just like the ones used by the students! Ever since, the Board of Governors chair has on several occasions promised to construct a good well-furnished staff room. I have now been here for six years and this has yet to happen.*

> Mr. Kitanga: *the school looked more like a local primary school. The staffroom was a small room and teachers were using desks similar to the ones used by students.*

For Mrs. Jimmy, working from a dilapidated and poorly furnished staffroom was frustrating and shaming, particularly when she received visitors. Moreover, for her, the condition of the staffroom did not mirror the perceived status of high school teachers.

> *The other day a visitor came here and said that they thought the staffroom was a dispensary for the students. I have seen many visitors walk into the staffroom to enquire where the staffroom is. The community expects high school teachers to have a comfortable and well-furnished staffroom. Ours is really a letdown to our professional image.*

I had occasion to sit in the staffroom many times in the course of this study and the staffroom is actually small and poorly furnished, even by the standards of poor rural schools. The room measures about 120 square feet and with 10 teachers squeezed behind tiny desks, there is little room for movement. The room also doubles as the games store; store being a large cupboard behind the door for storing balls, nets, and other sports equipment.

The teachers were also unhappy with the poor state of the school principal's office, even though it was the only office with the luxury of a visitor's chair. Detailing his first impressions of the school, Mr. Kisau remembered walking into the school on a Thursday afternoon, in the blazing September heat, eight years earlier, only to be greeted by a loud presence of poverty, epitomized, particularly, by the principal's office.

> *The first thing I saw here was poverty. I actually thought this was an extension of the primary school so I was busy looking for the secondary school. One of the teachers saw me and asked if he could help and I said I was looking for the secondary school, and he said, "You are right there brother!" I was ushered into the principal's office and my sense of foreboding heightened. The principal was sitting in a very tiny office on a chair that had one shorter leg. I thought he was struggling to balance. The table he was using was more like a coffee table.*

That was eight years before my conversation with Mr. Kisau, but in those intervening years, nothing much seems to have changed with regard to the staffroom and the principal's office. When I spoke to the principal, the office was

still the same tiny structure described by Mr. Kisau, even though this time the principal had a bigger table and a comfortable chair – at least it did not occur to me that he was struggling to balance on his chair.

The poor condition of the teachers' latrine was also a major source of shame especially for the female teachers. The latrine in question is a semi-permanent structure made of corrugated iron sheets for the perimeter wall, with a piece of cardboard partitioning the male and female cubicles. During the focus group discussion, one of the female teachers recounted how the toilets horrified her:

> *The iron sheets and cardboard used to partition the twin rooms of the latrines are not adequate for privacy. It is very embarrassing when you go to the toilet and another teacher, maybe the principal even, is in the adjoining room. I am particularly anxious when I receive a visitor, always dreading the moment they will ask to use our latrines.*

A telling account of how the school's lowly status affects the teacher's sense of pride was Mrs. Jimmy's experience when she represented her principal during the selection of Form 1 students at the district education offices. During the exercise, the ranking of schools – national, provincial, or district – determines the quality of students that each school will pick. The higher ranked schools, which also have many applicants, select their students first. Thereafter the lower ranked schools, like Kalamboni, pick from the remainder of the applicants. The humiliation of having to pick last, as well as the apparent sneering by her former

university classmates, made a big dent in Mrs. Jimmy's pride. Below is her account of the episode:

> *By the time our turn came, the room was quite empty. Even the ministry officials who were coordinating the exercise had left the room, leaving us with the lists of applicants for us to make our pick. It was very embarrassing to pick from the dregs. Some of my former university classmates teaching in the bigger schools filled up their classes rather quickly and departed. Their condescending tones as they came over to greet my team and bid us farewell said it all. Being a teacher in a small poor remote rural school marks you as a poor rural teacher too. I was very humiliated and swore never to attend any such functions in the future.*

In some cases, owing to the scarcity of adequate housing, teachers working in remote rural schools have to seek for accommodation in the homes neighbouring their schools and even in the homes of their own students. The school Parents and Teachers Association (PTA) chair as well as officials of the Kenya National Union of Teachers lamented the shortage of housing for teachers in schools in hardship areas, and the indignity the teachers faced in staying at the homes of well-wishers. A union official said as follows:

> *We have some of our teachers accommodated by well-wishers such as school neighbours, a fellow teacher, or even a nurse. Think of a female teacher who cannot trek the 17 kilometres to the nearest market centre. Other teachers will tell her "nituvoyaa mokomo kuu" [we beg for accommodation in the neighbourhood]. You can imagine the effect on the*

teacher's privacy and sense of professional dignity when she has to beg

for accommodation, sometimes from the families of her own students.

Even though majority of the teachers stay in rented accommodation in nearby market centres, the quality of housing is not very good particularly for teachers with families. Mrs. Jimmy highlighted this problem, explaining that it was cumbersome when one had several disjointed rooms behind a shop.

Accommodation is not good. I rent rooms behind a shop and security is

not good. We used to live in a nearby market here but thugs attacked us

several times and we had to move. I have several disjointed rooms that, as

a family person and a woman, I find hard to organize to my convenience

and taste.

The PTA chair admitted that lack of housing for teachers was a major concern for the management of Kalamboni secondary school, and that construction of houses for the teachers was a priority. However, owing to lack of finances due to the poverty of the school parents, the school management was unable to address the problem.

A major challenge and concern for the PTA is shortage of housing for our

teachers. The teachers reside very far, some at Kikaatini and others at

Mukolya markets. It is embarrassing for our teachers to live in tiny rooms

behind the shops We are planning to construct houses and a modern

staffroom for the teachers, but as I told you, our problem is lack of money.

Our parents are poor and cannot afford all the money we require of them.

The pain of staying away from family

Many of the teachers I had conversations with spoke of isolation from their families as a major hardship. For Mrs. Jimmy, staying away from her husband was particularly hard for her and her two young children. Owing to her husband's busy schedule over the weekends, Mrs. Jimmy had to travel every weekend to see her husband. This situation created a scenario that was culturally problematic, and a potential threat to her marriage.

> *Due to the nature of my husband's business, he is not able to visit at my place of work. Therefore, contrary to common practice, I have to travel to see him at home over the weekends. In our culture, as you well know, it is the duty of the wife to make the home – to take care of the children and to ensure that the home is running efficiently. It feels weird when I go home on Fridays, sometimes arriving late in the evening due to the unreliable public transport, to find my husband busy preparing dinner. He is a very understanding and supportive husband, but we live in a rural environment where traditional values still hold strong. You never know when some of his friends, or even family, will start telling him that his wife seems to be the "man" of the house!*

For Mr. Thomas, living away from his family was affecting his teaching. When I spoke to him, his two young children, aged four and two, were living with his parents on their farm since his wife was also away in college. As such, the teacher had to travel to his parents' home, about 40 kilometres away, midweek and over the weekends to check on his children. Due to the poor transport system,

he had to hire bicycle or motorcycle taxis for the journey. This meant that on those days when he travelled home, he would arrive to school, as he put it, *"late, tired, and dusty"* the following morning.

The pain of being away from his family was a source of deep loneliness for Mr. Njuguna too. For him, the only teacher from a different ethnic community in the school, loneliness began in the staffroom where the teachers insisted on conversing in their local language thus isolating him from their conversations. The teacher described his loneliness thus:

> *Being away from my family makes me very lonely here, and that is a big hardship for me. My evenings are lonely. I do not take beer, so I stay in my house and watch television – we only receive one channel here. I am lonely in the staffroom, where the teachers only converse in Kikamba even in my presence. In some of the staff meetings, too, the principal conducts the proceedings in Kikamba! When I travel home over the weekends, I am very hesitant to come back here.*

Insecurity

Several participants in the study identified insecurity as a hardship that made them particularly anxious. A number of the teachers I spoke to indicated that they used to live at a nearby market but had to move away after burglars broke into their houses several times. Indeed, at the time of this study, only one teacher, Mr. Kisau, was living at the nearby shopping centre as all the other teachers had moved owing to insecurity. I asked him whether the insecurity worried him and Mr. Kisau replied as follows:

No. Actually when the other teachers moved to another market due to

security concerns, I did not move. Indeed, I am now the only tenant in the

residence where I stay. In my opinion, insecurity is everywhere. I like it

where I am because it is a walking distance to school and my children

attend the primary school across the road so we walk together in the

morning.

The Kenya National Union of Teachers officials informed me that insecurity was a major problem in many remote rural schools and that they were dealing with a case involving one of their members who had been raped.

Security, rather insecurity, is a big issue. Many of our members living in

rented rooms behind shops in rural markets have complained of frequent

break-ins. We are currently dealing a very serious case involving the rape

of one of our members.

Mr. Njuguna brought up a different perspective to the issue of insecurity. For him, being a "foreigner" in the sense that he was from a different ethnic community had security implications. For one, the fact that even his own colleagues spoke in their own vernacular even in his presence was bothersome and made him feel vulnerable. More importantly, an incident early in his stay at Kalamboni had alerted him to the potential of ethnic hostility. He narrated the incident as follows:

We used to require that students buy their own textbooks. Many could not

afford the books owing to poverty, but we had to send them home to

underscore our seriousness. I was particularly insistent that my students

have the mathematics textbook and a mathematical set. My zeal in sending

the students home to buy those items did not augur well with some of the

community members who said I was from a rich community and that I was

not sensitive to the community realities here.

Weak students

One surprise finding was the contention by some teachers that the poor

quality of students in their school was a hardship. I had expected to hear about

poor facilities and shortage of books but Mr. Kisau surprised me when he

declared that the students were a hardship.

For me, our clients, the students, are the biggest hardship. We get very

academically weak students and yet we are supposed to turn them into

university material in four years. Moreover, majority of our students are

from the neighbouring primary school and so for them secondary school is

only an extension of primary school. We have to work extra hard to have

them make the mental transition from primary school. This is a very hard

task.

The quality of the students is understandably poor since the poor rural

schools only admit the remainder of the students after the bigger national,

provincial, and district schools select the best. Moreover, such schools as

Kalamboni that have no boarding for their students only admit students from the

local area thus limiting their catchment area and, hence, competition for the

brighter students who prefer the better facilitated provincial boarding schools.

The teachers also explained that due to poverty, some students did not have adequate food at home and were therefore physically weak. Some of them, furthermore, had to walk long distances to school, thus adding to their physical weakness. Other students were physically abused at home by their parents or relatives. According to Mrs. Jimmy, such problems could lead to poor academic performance.

> *Some of the students come to school very tired due to walking long distances; some say they are overworked at home and have no adequate time for revision; some have told us they stay with relatives who mistreat them. Others lack food at home. When you go to class these are the students you meet and sometimes you may not know the source of their poor performance.*

According to the teachers, the attitude of parents about the school also contributed to the poor performance of the students. The teachers complained that some parents viewed the schools as second-rate, while others were not keen on the academic progress of their children. Such apathy was evident, for example, where some parents would only pay fees for their children at the school after paying the fees of their other children attending better schools. When I suggested that such apathy could have been a result of the parents' poverty, a teacher quickly disabused me of the idea.

> *This has nothing to do with poverty. Some of the parents are poor but others believe this is a second-rate school and they will only pay fees here after paying fees for their children in other schools. Some of the girls here*

have told me that their parents support their siblings in better schools

more. One of them told me that her parents had dumped her into this

"dustbin" and she had no way of getting out. Such a child has completely

lost hope. This makes our work very hard indeed.

Such parental apathy obviously affects the morale of the students who are already

weak academically and studying at a poorly facilitated rural school. Given the

circumstances, it is understandable for the teachers to describe the weakness of

their students as a hardship. Mr. Kisau summed up the frustration of teaching such

academically weak students as follows:

The students here hardly challenge the teacher. I really do not have to

prepare very seriously to teach here. The students hardly ask any

questions. This may look easy and good, but it makes one retrogress. I

would be happy to teach in an environment where the students challenge

me more.

Inadequate teacher education

Following up on the issue of poor quality students, I asked the teachers

whether their teacher education had prepared them for the challenges of teaching

in a poor rural school. Whereas majority of the teachers felt that their teacher

training was adequate, two teachers were particularly forthright that teacher

education programs were tailored for ideal classroom conditions and, as such, did

not address the reality of schools in hardship areas. Mr. Kisau recounted the

problems he encountered in teaching science without even the most basic

apparatus such as Bunsen burners and beakers.

My teacher education prepared me to work in a school with well-equipped laboratories. When I came here the school did not have a laboratory, yet I was supposed to prepare students for the national examinations. Someone should have prepared me for the realities of poor schools in hardship areas.

Mr. Kitanga, on his part, complained that he had to devise his own methods to teach without class textbooks and other essential facilities such as wall maps. He felt that teacher education programs should specifically address the issue of teaching in hardship areas. He expressed his frustration thus:

My teacher education did not anticipate the problems I have encountered in schools in hardship areas. We never discussed, for example, how to teach in a situation where there are no student textbooks and basic teaching aids such as wall maps. My teacher education emphasized student-centred and learner-directed learning, but given our circumstances here, the teacher has to do the bulk of the work. I think ours is teacher-directed learning. The teacher has to adjust to being the only source of information for the students.

Remoteness

When I embarked on conversations with various participants in this study, I expected to hear a lot about problems relating to harsh terrain and climate, lack of water, and poor communication. Interestingly, only the education officers and the officials of the teachers' unions spoke at length about such problems. The teachers rarely spoke about these problems and some even described them as

"normal" hardships. Nevertheless, shortage of water, shortage of fresh food, and poor communication and transportation were problems that teachers at Kalamboni secondary school experienced. A major concern expressed by many of the teachers was the risk of water-borne diseases due to the poor quality of drinking water. Others lamented that they could not provide a balanced diet to their families due to lack of fresh foods especially fruits and vegetables. Owing to the remoteness of the area, transport is erratic and unreliable; there are no telephone services, and newspapers arrive a day or two later. This leads to a sense of isolation, and at times desperation. One teacher highlighted this as follows:

Besides the normal problems of food and water shortage, I think working in a hardship area is professional suicide. Here one stagnates because the opportunities for professional growth and development are limited. Moreover, we hardly get information about courses and other important stuff because we are isolated due to poor communication and transport means. Daily newspapers, too, are rare and when we get them, they are two or three days old. On a lucky day, a visitor like you comes with a newspaper that we borrow.

Teachers also said that the absence of banks nearby forced them to keep large amounts of money at home for their recurrent use and for emergencies, which was a security risk. Indeed, many of the teachers said that they only visited the bank at the end of the month and it was easy for criminals to know when they had money. Moreover, the teachers also complained that they could not save consistently as they had to withdraw most of their money to cater for

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emergencies. This was a source of anxiety for such teachers. Mr. Thomas captured this as follows:

> *Due to transport problems, I only go to the bank once a month. As such, I have to withdraw a lot of money to cater for my expenses and for emergencies. It is a security risk to keep such large amounts of cash in the house. Moreover, it is hard to have a stable saving plan. How do you save when you have to withdraw more money than you need simply because you are not able to access the bank quickly in case of an emergency?*

Yet for others, remoteness in the form of poor transport and lack of health facilities was a major concern. For Mrs. Jimmy, in her eighth month of pregnancy, poor transport services and lack of medical facilities caused her constant anxiety. The nearest hospital at Wote, the district headquarters, was only 50 kilometres away but hard to access due to poor means of transport. Having travelled on the bumpy and dusty road to Kalamboni, I could readily appreciate Mrs. Jimmy's concern:

> *I am always anxious about getting complications relating to my pregnancy given that transport here is very poor and the nearest hospital is over 50 kilometres away. I do not know what I would do if I were to get labour pains in the night. Thankfully, you have a car and so for now I am relaxed and not overly worried about emergencies!*

Policy Interventions for Addressing Hardships in Remote Rural Schools

The government of Kenya has implemented two policy measures, namely, payment of hardship allowance and decentralized recruitment, to attract and retain teachers in hardship areas. Documents at the Directorate of Personnel Management (DPM) and at the Teachers Service Commission (TSC) showed that the payment of hardship allowance had a long history dating back to the colonial days. Before and immediately after independence, European officers working in the designated hardship areas received a Family Separation Allowance, while their African counterparts received a Frontier Allowance. In post-independence Kenya, the government reintroduced a hardship allowance for civil servants and teachers posted to the designated hardship areas in 1969. The allowance also included a small component to purchase a refrigerator and a bicycle.

Starting in 1994, teachers were paid hardship allowance at the rate of 30% of their basic salary without any ceiling and irrespective of marital status. The rate ranges between 3, 055 shillings for the lowest paid teacher and 13, 497 shillings per month for the highest paid teacher. This different rate for teachers was the result of a bargain by the Kenya National Union of Teachers (KNUT) ratified through a Collective Bargaining Agreement with the TSC in 1997. As per the December 2007 payroll, the TSC was paying hardship allowance to 61,381 teachers at a cost of 254, 983,834 shillings per month.

Starting in 2001 the government of Kenya decentralized the recruitment of high school teachers. The expectation was that the new policy would address, among other things, the perennial shortage of teachers in remote rural schools.

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The TSC, in its policy document on decentralized teacher recruitment, stated that the new system would "provide opportunities to remote and difficult areas to attract and retain teachers (TSC, 2006, objective iv)". The reasoning behind this conviction was that the new demand-driven recruitment process would be more inclusive and participatory in that individual school authorities would identify teachers likely to work in their schools. Similarly, prospective teachers would have a choice of where to work thus they would be more inclined to stay on. Previously, the TSC was solely responsible for the recruitment, deployment, and transfer of teachers from its headquarters in Nairobi. School boards and individual teachers had little say over teacher deployment, a factor that affected remote rural schools adversely since teachers posted to such schools rarely took up their appointments. Under the new policy, individual secondary schools through their Boards of Governors (BOG) are responsible for recruiting their own teachers while District Education Boards (DEB) are responsible for recruiting teachers for primary schools within the particular district. However, the TSC is still responsible for salaries and the overall management of the teachers.

In order to capture teachers predisposed to work in a particular school, the TSC guidelines for recruitment and selection of secondary school teachers (Appendix C) allocate points for previous experience working in the school under the BOG as follows:

5 years and above – 25 points

4years – 20 points

3 years – 15 points

2 years – 10 points

1 year – 5 points

This explains why Mrs. Jimmy found it prudent to choose Kalamboni secondary school as she had previously worked in the school as an employee of the BOG. Such previous experience gave her a competitive edge.

Even before I completed my degree, I used to work in this school over the university holidays. Therefore, I chose to come here because it was convenient for me in terms of availability of employment. I was strategically well positioned for employment here.

Moreover, the new policy also entails the caveat that a teacher has to remain in the school for at least five years before a request for transfer can be entertained. This condition is meant to create a measure of stability and ensure continuity in terms of teacher presence particularly for schools in hardship areas, given that teachers posted to such schools previously hardly reported or sought for transfer shortly after reporting to the schools.

Apart from outlining the policy interventions above, this study also sought the views of the various participants regarding the intervention measures outlined above. I present these views in the following section.

Views on the Various Policy Interventions

One of the objectives of this study was to interrogate the views of the various participants regarding the policy measures for attracting and retaining teachers in remote rural schools. My conversations with various participants revealed varied reactions to each of the policy options.

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Views on hardship allowance

There was a marked division between the participants on their views on hardship allowance. This was a surprise as I had expected unanimous support for the allowance particularly from the teachers. On the one hand, some of the participants, especially the teachers, felt that the hardship allowance was irrelevant and did not address the hardships they faced. According to these teachers, the allowance had no bearing on the hardships they faced including loss of quality family time, loneliness, weak students, and lack of clean water. One of the teachers in the group discussion aptly captured this thinking as follows:

> *My problem is that I am lonely at night; my family is very far away. I also cannot dress to my satisfaction here because of the heat and the dust. The money is welcome but it does not address any of the hardships I face.*

Some of the teachers commented that besides being irrelevant, the allowance was becoming a bother. The allowance was not a panacea for the many problems facing the teachers yet the education officers expected them to work extra hard since they were earning the allowance. Mr. Kisau spoke on this dilemma:

> *Some parents and even education officers have told us that we should now be in a position to compete with the better-facilitated schools since we are receiving good hardship allowance. How does the allowance address the barriers that inhibit good performance? The allowance is now a bother, indeed a hardship of its own.*

Some teachers, on the other hand, felt that the hardship allowance was a good idea as it boosted their income and somewhat mitigated some of the hardships they were facing. According to the District Education Officer, the allowance compensated, to some extent, for the discomfort and challenges the teachers faced:

> *It is okay to pay the teachers some allowance because given a choice people would want to work where they are most comfortable. The allowance in a way compensates for the loss of comfort. Moreover, it makes the teachers at least feel that their employer has not abandoned them.*

Moreover, for some of the teachers, like Mr. Kitanga, the boost was more so welcome since they were receiving a hardship allowance while working in their own home area. Interestingly, it was Mr. Njuguna, the teacher from a different ethnic community, who had the most positive views on the hardship allowance. For him, the allowance was a noticeable increase in his salary:

> *Surely, I am getting a lot of money. By the end of this month, I will be at the top of my job group, and 30% of that is very good money. Even though I would love to transfer, I have made good use of the extra income occasioned by the hardship allowance as collateral to secure loans from banks and other financial institutions.*

The use of the extra income afforded by the hardship allowance by teachers to secure bank loans presented an unintended positive consequence. According to the District Human Resources Management Officer, the hardship

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allowance had led to teacher retention, though in a manner that the TSC had not envisioned. Owing to the extra income from the hardship allowance, many teachers had secured huge bank loans. Such teachers could not risk leaving the hardship areas, hence losing the hardship allowance, before they cleared their bank loans. According to the officer, schools with such teachers were sure to retain those teachers for periods ranging from five to ten years, the average time it took to pay off their loans.

Some participants felt that whereas the allowance was well intended, it was indicative of the government's narrow view of rural hardships. The participants felt that the government had no excuse, forty years after independence, to have areas as undeveloped as Kalamboni. To them, therefore, the priority would be a recommitment to equitable development rather than paying a few public officers and teachers a hardship allowance. Mr. Naibu had a lot to say on this:

> *For me, the hardship allowance is mere window dressing. I spend more than the allowance. I spend over 8,000 shillings a month whereas the allowance is only 7,500 shillings. Moreover, hardship is personal and the government did not consult me regarding the hardships I face here! What should compensate for hardship is not money. The government should endeavour to provide basic infrastructure. After all, the other Kenyans living here do not get a hardship allowance. The whole country should be comfortable for professionals to be able to work in any part with reasonable comfort. I would have no problem losing the allowance if my*

comfort was assured. After all, after a few months, the allowance becomes

a routine part of your income and you are no longer aware of it.

The Kenya National Union of Teachers officials, while embracing the hardship allowance idea as their own brainchild, felt that the payment of the allowance did not absolve the government from its responsibility to develop all areas equally, and to provide basic infrastructure and other necessities to remote rural areas.

We are happy that we negotiated for a good hardship allowance for our

members. However, the allowance does not reduce the hardship but only

cushions the teachers. Ultimately, the government should not stop at

paying the allowance but should provide the basic amenities especially

water. The government has been talking about clean water for decades.

Even if you get a lot of money but the water is dirty, the money cannot

replace the lack of clean water.

Another group of participants felt that the hardship allowance was not adequate and they would have preferred a larger amount. Interestingly, some of the teachers who were opposed to the payment of the hardship allowance were the ones rooting for the allowance to be increased. Their argument was that the allowance was not reflective of the exorbitant cost of living in remote rural areas and thus the teachers were spending much more than the allowance. Furthermore, the teachers argued that there was need to make the allowance high enough for it to attract teachers to the hardship areas. The following is what one of the teachers said:

Who said 30% is adequate and why is it 30% anyway? I receive 7,500

shillings as hardship allowance yet my living costs exceed 10, 000

shillings. I have yet to see a teacher seeking to transfer to a hardship area

to earn the allowance. If the government truly wants this allowance to

attract teachers, then it should increase the allowance significantly.

Views on decentralized teacher recruitment

While some participants felt that decentralized teacher recruitment was a

prudent policy, which, with a few improvements, would work well, other

participants dismissed the policy as retrogressive, prone to abuse, riddled with

corruption, and a dereliction of responsibility by the Teachers Service

Commission.

Those who supported the policy argued that it was particularly beneficial

to small poor schools that used to be perpetually understaffed. Participants praised

the requirement for newly recruited teachers to stay in the school for a minimum

of five years as a move that would enhance stability in the staffing of such

schools. The District Human Resource Management Officer spoke of

decentralized recruitment as follows:

It is helping very much because we are now sure that the newly recruited

teachers will be in a particular school for at least five years before they

start disturbing us with requests for transfer. The five years is enough to

see the teacher take a whole cohort through secondary school. This is

good for the students especially, and for us too, because it brings some

stability in the staffing of rural schools.

The officials of the Kenya National Union of Teachers were especially supportive of decentralized teacher recruitment and in particular the recruitment of teachers from the local area. The union officials, while admitting that such localized recruitment could foment tribalism, argued that it was a realistic way of staffing rural schools and enhancing teacher retention.

We want our own! We as a district have been disadvantaged for a long time with regard to the supply of teachers. When recruitment was centralized, we used to get teachers posted here but many never reported, and those who reported did not stay long. Our schools were perpetually understaffed. With decentralized recruitment, we employ our own and they are willing to stay.

Decentralized recruitment was not only an advantage to small schools but also to individual teachers. One of the teachers recruited through this system, Mrs. Jimmy, praised the system as a godsend for rural teachers as "*it enhances the employment chances of village people like us since the city-based teachers are less willing to apply for teaching jobs in the village schools.*" Moreover, decentralized recruitment of teachers gave school Boards of Governors and the concerned teacher a chance to meet, unlike previously when they had teachers posted from Nairobi. According to the Parents Teachers Association chair, the process also allowed the teacher to get a feel of the school before committing to work there.

This is a good idea. The teacher gets a sense of where they will be working. We also get to meet the teacher and get a sense of what to

expect. I think this is better than having someone posted here from

Nairobi.

A negative side to decentralized recruitment that many of the participants pointed out was its potential to stoke the embers of tribalism. Tribalism in Kenya is a sensitive issue especially following the tribal skirmishes that flared up after the 2007 general elections leaving many people dead and thousands displaced. Strong sentiments like those held by the KNUT officials about *"recruiting our own"* have in fact led to tribe being a factor in the recruitment of teachers. Even though the government has vehemently opposed this, the reality on the ground is that District Education Boards and school Boards of Governors consider tribe as a factor in teacher recruitment. According to a KNUT official who also sits on the District Education Board, the board scrutinised the Identity Cards, and marriage certificates in the case of married women, of prospective teachers to establish their ethnicity and ties to the district. Their reasoning was that even though this was ethically and professionally questionable, it was a practical way of getting teachers who were truly committed to working in the area.

However, some participants felt that such reasoning, though plausible, was not sufficient justification for introducing tribe as a factor in teacher recruitment. Teachers viewed the emergent practice as dysfunctional and antithetical to the educational objective of fostering national unity. Officials of the Kenya Union of Post Primary Teachers (KUPPET), unlike their counterparts in KNUT, were opposed to decentralized recruitment of teachers. They described it as a serious dent to the gains made in the quest to eradicate tribalism and nepotism.

The issue of recruiting "our own" is putting a lot of pressure on school

principals and Boards of Governors. The recruitment criteria are very

clear, but the pressure by politicians and big people in government is too

much. After the post-election violence in 2007, there are regions that are

no-go zones for people from other ethnic groups. Teachers have been

coming to our offices seeking support for their requests to transfer from

areas where they are viewed suspiciously because of their tribe.

Participants also questioned the competence of school Boards of

Governors to interview prospective high school teachers. To qualify as a member

of a school BOG, one is required to have at least high school level of education.

However, as pointed out earlier, many schools in remote rural areas struggle to

get qualified members. Teachers who had participated in the decentralized

recruitment process said that the majority of the BOG members were not

competent to interview high school teachers. Below are observations by Mr.

Thomas and Mr. Njuguna regarding their experiences on decentralized teacher

recruitment. Mr. Thomas' account is on his experience when the BOG

interviewed him, while Mr. Njuguna relates his experience as a member of the

panel that interviewed teachers at the school.

Mr. Thomas: *The BOG members in the panel were very passive. I thought*

they only asked questions because they had to speak. The principal and

the teacher on the panel asked almost all the questions. I got the sense that

the BOG members had been guided by the principal on what to ask.

Mr. Njuguna: *The process is not very straightforward. I think that in some cases the principal can influence the BOG. My experience is that the BOG members are not very enlightened, so the principal tells them what questions to ask.*

The cause of disaffection is really the fact that some of the BOG members have inferior academic qualifications hence the feeling by the teachers that such BOG members are not qualified to interview the teachers. These comments, moreover, are indicative of a simmering discontent with BOGs, which many view as appointees of politicians and school principals. With the introduction of decentralized educational management, there have been proposals, especially by parents and the teachers' unions, that school Parents Teachers Associations (PTAs) should replace the school boards in the management of schools since the PTAs are accountable to the parents and teachers. A comment by an official of the Kenya National Union of Teachers underlines this simmering conflict:

There is a lot of conflict. Our position is that it is unfair that the PTA collects school funds yet the BOG manages those funds. The BOG has all the power – to punish teachers and even to determine the principal they want, yet they have no direct interest in the school. Some boards have very powerful chairpersons who run the schools like personal property. We do not need the two committees. The PTAs should interview teachers and manage schools since they are answerable to the parents. The Education Act should be amended to reflect this reality.

However, the school PTA chair had a different opinion on the issue and felt that school boards were necessary in the management of schools. He argued that the board members brought a broader perspective to school management.

Some people are for the abolishment of BOG, but I think this is ill advised. The BOG brings in a wider perspective into the management of the school. Moreover, members of the BOG are likely to have wider contacts and networks since they are selected from among influential people in the community. What may be necessary is to ensure that the selection of the BOG is done in a good way to target progressive individuals.

There is, however, evident power struggle in the District Education Board especially between the two teachers' unions. Each of the unions claims to be the legitimate voice of teachers, a fact that, as the District Education Officer pointed out, is repeatedly played out at every board meeting and especially during the recruitment of primary school teachers.

The two unions are members of the District Education Board. They are always bickering over one thing or the other, which interrupts our meetings. Officials of the Kenya National Union of Teachers are especially confrontational, particularly during the recruitment of primary school teachers. They bang tables and punch the air. They take advantage of every meeting we call to antagonize us. We are not pulling in the same direction.

My conversation with the school principal on decentralized teacher recruitment surfaced the question whether or not the policy was a genuine effort

by government to empower school Boards of Governors. In reality, the policy cedes very little power to the school board. In the principal's opinion, the policy only amounted to delegation since the recruitment guidelines issued by the Teachers Service Commission left very little leeway for the Board of Governors. He highlighted two issues in the recruitment guidelines that, in his opinion, made the policy highly problematic:

> *First, 95% of the marks are already pre-determined. The panel sitting here has say over only 5% of the marks. These relate to communication ability, special talent, and willingness to participate in co-curricular activities and other duties assigned by the head. How can it be decentralization when the BOG only has power over 5% of the marks? The candidates are normally highly qualified and the 5% is very limiting where we have to break a tie. This is why some people may feel that the BOG is not fair. Second, the guidelines favour teachers who graduated earlier in that they get more marks. For me, this is problematic since we may miss the best teacher just because such a teacher graduated more recently. In my opinion, the guidelines do not help us to choose teachers who are best suited to work in hardship areas. At the end of the day, this is just another government project.*

Who is willing to stay?

As a follow up on the discussions with the teachers I asked them whether, in light of the hardships they had identified, and taking into consideration the measures taken to retain teachers hardship areas, they were keen to transfer or

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were content to stay at Kalamboni. Several teachers expressed willingness to continue working at Kalamboni. Some of the positive reasons given for this decision included a good working environment, good relations with the community, and a good administration. Mrs. Jimmy captured this quite aptly:

The school is great. The teachers are good company and the students are terrific. I think I have become used to this area now. In addition, the administration is very good as they have allowed us a free hand in the management of our work and this is very good in our circumstances.

An interesting reason for the decision to stay was commitment to a personal vision. Working in a hardship area made some of the teachers realize that they had a duty beyond their personal comfort and convenience. The following three comments from the principal, Mrs. Jimmy, and Mr. Kisau were particularly captivating:

Principal*: My vision is to make this school a model day school, where the results are excellent and the teachers are happy to work here. My challenge is to bring the teachers, parents, PTA, teachers, BOG, and community on board to support this vision. I have seen this school from its infancy and I would be happy to retire from here.*

Mrs. Jimmy*: I chose to come and work here and I have a duty to be a positive role model especially for the girls in the school.*

Mr. Kisau*: My dream is to make this school my home away from home. Talking of which, one of the teachers in the school is a former student here and he was one of my best students. It is my joy when I see such students.*

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Moreover, I have many friends in the community and some of them even

want me to settle here permanently.

Some of the teachers had made their decision to stay out of frustration arising from failure to get transfer to schools of their choice. Such teachers, like Mr. Njuguna, decided to stay and make the best of their stay at Kalamboni. Interestingly only one teacher was still keen on leaving Kalamboni. The teacher, Mr. Thomas, informed me that his priority was to live with his family. It was not possible for him to bring his family to Kalamboni, as there were no good schools for his children. He was only waiting to complete the mandatory five years stay at the school before seeking for transfer to a school nearer his home.

Yes, I am always thinking of transferring from here but I am bound by the

five-year rule. I have to face my five years here and swallow the pill

however bitter it is. Immediately my five years are up, I will apply and

push for a transfer.

In the following section are suggestions made by the participants regarding possible measures for attracting and retaining teachers in schools in hardship areas.

Suggestions for Attracting and Retaining Teachers in Remote Rural Schools

One of the objectives of this study was to seek the participants' opinions about possible policy interventions for attracting and retaining teachers in remote rural schools. The suggestions fall into three broad themes, namely, focused incentives, inclusive policy framework, and a holistic view of hardship.

Focused incentives

It was apparent that the incentives given to the teachers in a bid to attract and retain them in hardship areas were not effective. The teachers especially were of the view that there was need to rethink the incentives and to make them more meaningful. A popular suggestion was to have the time that a teacher worked in a hardship area count towards promotion. Teachers suggested the introduction of a promotion scheme whereby serving in a hardship area for ten years, for example, would earn a teacher a raise of two job grades. Currently there is no such scheme and teachers felt that the years they worked in hardship areas were lost. The principal, Mr. Kivala, added that such a scheme should have a component for recognizing head teachers in hardship areas as they faced extra hardships.

> *Working in a hardship area should count towards promotion for both teachers and administrators. As an administrator, I face extra hardship in having to deal with many personal and family problems facing my teachers. If this were the case, teachers would be motivated to work and remain in hardship areas and even aspire to hold administrative posts.*

Another suggestion by the teachers was to allow teachers who had served in hardship areas for the mandatory five years to transfer to schools of their choice unconditionally. Currently, transfer for all teachers in the country is contingent upon the availability of a suitable replacement for the teacher seeking the transfer. According to one of the teachers, this condition makes a posting to a school in a hardship area a "death sentence" as it is very hard to get a replacement when one

seeks transfer. Mr. Njuguna, for instance, felt that he was serving such a sentence after working in hardship areas for his entire sixteen-year teaching career.

An almost unanimous suggestion was that there was need to provide adequate housing for teachers in hardship areas. Participants felt that housing for teachers was a priority as teachers in hardship areas spend a lot of time traveling to and from their rented houses, normally in market centres far from their schools. The teachers felt that whereas the school BOG was justified in prioritising the welfare of the students, it was equally important to prioritize the welfare of teachers particularly with regard to housing. During the focus group discussion, where this issue was particularly heated, a teacher, Mr. Maithya, commented as follows:

> *In this school, we do not have houses for teachers. This is a big problem.*
> *It is a problem to arrive here on time in the morning. I always like*
> *teaching very early in the morning, even before the official time for*
> *teaching. However, that is hard here since I have to walk about 7*
> *kilometres to school.*

I had expected that many of the participants, especially the teachers, would overwhelmingly suggest an increase in the hardship allowance. Interestingly, there was very little mention of the hardship allowance. Nonetheless, some teachers suggested the need to increase the allowance and, more importantly, to make it part of the salary and therefore count towards their pension. Such a raise did not preclude the need to increase the salaries of teachers generally since, as one teacher argued, the salaries paid to teachers were very low

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and therefore the 30% hardship allowance did not amount to much. On average, a graduate teacher in Kenya earns 30,000 shillings per month (about 500 Canadian dollars). The teachers felt that the hardship allowance should be at least 50% of the basic salary thus substantial enough to give them a noticeable financial advantage over those teachers who were not working in hardship areas. The following comment by Mr. Njuguna sums up these sentiments:

> *More money could entice some of us to stay here but it should not be 30%. It should be a lot more, at least 50% of the basic salary. The money should make me feel that I have an advantage over teachers who are not in hardship areas.*

Real decentralization

The move by government to decentralize teacher management could hold the solution for many of the problems staffing schools in hardship areas. However, participants called for genuine commitment to decentralization on the part of government. The school principal, Mr. Kivala, felt that the TSC was being "cheeky" in pretending to have decentralized teacher recruitment, while in reality ceding very little discretionary space to the BOG. He argued that the BOG had to have more leeway if decentralized recruitment was to make sense

> *It is not really decentralization. The TSC has only localized the recruitment centres but not the power to recruit. As it is, the work of the BOG is easy for all we do is to allocate the marks as stipulated. But are we really responsible for the recruitment if all we can play with is 5% of*

the marks? The TSC should allow the schools more discretion to recruit

teachers who are ready to work in remote areas.

The District Education Officer further pointed out that giving more powers

to District Education Boards and school Boards of Governors would, moreover,

be a prudent move since these bodies were more accessible to the teachers and

could respond more appropriately to the needs of teachers within their particular

jurisdictions. Granting complete discretion over teacher recruitment to the boards

would, for instance, enable them to identify teachers who were best suited to work

in hardship areas. Such powers would also entail the ability by the boards to give

teachers appropriate rewards and incentives, thus the ability to tailor such

incentives to the particular hardships and needs of specific schools and regions.

Decentralized teacher recruitment, if well implemented, is the best policy

for staffing schools in hardship areas. In my opinion, the District

Education Boards and school Boards of Governors should have more

powers to recruit teachers who best fit their particular localities, and to

design incentives that address the hardships in such localities.

Inclusive policy machinery

A majority of the participants felt that the policy framework for addressing

issues affecting teachers in hardship areas excluded the views of grassroots

stakeholders and especially the concerned teachers. The participants felt that the

process of naming the hardships faced by the teachers, as well as determining the

hardship areas, was too abstract and political, and dominated by the views of

bureaucrats in Nairobi. One teacher described hardship as personal and lamented

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that no one had sought his experiences of hardship and suggestions on what would make him willing to stay in a hardship area.

The District Human Resource Management Officer, who had served on a government task force that reviewed the hardship areas, said that issues of bureaucracy, rank, and protocol hindered free participation in the deliberations of the task force. Moreover, the team was top-heavy with officers from Nairobi and their view of rural hardships was constrained by their urban mindset. In his view, the ideal team would also include various grass roots stakeholders.

> *There was too much emphasis on rank and protocol and this hindered free participation by the junior members of the team. In my experience, the review task force should be broader and should include government officers from Nairobi and from the districts, teachers' union officials, school managers, teachers, and even community members.*

Other participants described the issues affecting schools in hardship areas as complex thus requiring complex solutions. One such solution would be the inclusion of the contribution of experts outside of the field of education. Mr. Naibu suggested that there was need to invest in research that would garner the views of such experts.

> *This is a case of a shoe with many wearers; the pinching points are varied. In my opinion, government should invest in serious research on the problems of schools in hardship areas. The research I envision should include other professionals besides educationists. The expertise of surveyors, economists, farmers, policy analysts, and educationists would*

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inform a more broad definition of hardship thus allowing for appropriate

policy responses to the problem of teacher shortage in remote rural areas.

Officials of the teachers' unions, particularly the KNUT, felt that branch officials had a major role to play in all policy processes affecting their teachers, particularly when it came to informing policy relating to issues directly concerning the everyday lives of their members.

We strongly feel that the union branch officials should be major players in

this endeavour. We are more in touch with the grass roots and thus in a

better position to understand the problems teachers face and to advise

government accordingly.

A holistic view of hardship

Closely related to the need for an inclusive policy framework was the suggestion that there was need for a holistic view of hardship. Such a holistic view of hardship would necessarily interrogate the systemic, political, social, and historical causes of hardship. Participants felt that the overarching influence of politicians and powerful government officials in determining hardship areas had led to a narrow view of hardship within policy circles. As such, the resultant policy interventions were largely irrelevant to, and ineffectual in dealing with, the real problems affecting teachers and schools in hardship areas. Participants agreed that there was need for a wide-lens view of hardship. On this, officials of the Kenya Union of Post Primary school Teachers (KUPPET) stated as follows:

The government views hardship politically. Whereas the Directorate of

Personnel Management (DPM) should have free rein in determining and

Gazetting hardship areas, this is, unfortunately, not the case as the

process has been too politicized and politicians now determine the

hardship areas. To clean up the whole process is now very difficulty. This

is an important issue for politicians and a sure way to earn the support of

teachers who have a lot of influence on the voters especially in rural

areas. We are fighting to have the government look at individual schools

and not zones or districts.

Recalling his experience with the government task force that reviewed

hardship areas, the District Human Resource Management Officer further narrated

how politics constrained the definition and demarcation of hardship areas.

I have previously participated in the review of hardship areas and I can

tell you that the task force faced immense pressure from politicians, the

teachers unions, and other powerful individuals. Politicians, government

officers, and even the teachers' unions have overly politicized the matter

of defining hardship areas. You have even seen politicians and teachers'

unions sending delegations to the president to canvass for their areas to

be on the list of hardship areas. We need an inclusive process all right,

and a deep analysis of what hardship entails, but what we need more is

that all the parties involved shed their parochial interests and prioritize

the interests of the nation.

Participants also highlighted the need to redefine hardship areas utilizing a

more fluid demarcation system rather than strict adherence to political boundaries.

This is because relying on administrative boundaries disadvantaged teachers

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working on the border areas as well as in pockets of hardship within otherwise well-endowed regions.

Overview of the Findings of the Study

In this chapter, I have presented findings from the study. The findings highlight various experiences and understandings of hardship as it relates to the work of teachers in remote rural schools in Kenya, the policy interventions taken to address those hardships, and the views of various stakeholders regarding the said policy interventions. I have also presented suggestions by the participants on possible ways to enhance attraction and retention of teachers in remote rural schools.

The study revealed two levels of understandings regarding hardship. The first level entailed government understanding of hardship. Such understanding informs policy on determining hardship areas and incentives for attracting and retaining teachers in such areas. Review of official documents revealed that the government view of hardship entails unavailability of food and potable water, insecurity, inadequate transport and communication services, community poverty, limited availability of social services and amenities, and harsh climatic conditions. Other participants identified the same to be hardships facing teachers in hardship areas. These hardships, and in particular the absence of banks and hospitals, caused anxiety to the teachers.

The study, furthermore, interrogated the experiences of hardship by teachers, school administrators, officials of teachers' unions, and education officers at the grassroots level. From the conversations with these participants, the

study identified five categories of hardships. School administrators and education officers identified administrative hardships. These relate to problems of managing schools due to shortage of teachers and shortage of funding, and poor definition of hardship areas causing problems in the management of teachers in border areas. Teachers identified erosion of professional pride as a hardship particularly because of the myriad problems associated with the poverty of their school. Such problems include shortage of furniture, a dilapidated staffroom, shortage of accommodation, and poor washroom facilities. Teachers also identified distance from family as a major hardship. This caused loneliness, poor concentration at work, and was a threat to marital stability for some teachers.

Another hardship that the study identified was insecurity. Such insecurity had led the teachers to shift from their rented accommodation close to the school to a market further from the school. Finally, the teachers spoke of the academic weakness of their students as a hardship. Such weakness was mainly rooted in the low qualifications the students had upon joining the school. Poor learning facilities, poor diet, and in some cases unsupportive parents exacerbated the academic weakness of the students.

Policy measures employed by the government to attract and retain teachers in remote rural schools included the payment of hardship allowance and decentralized teacher recruitment. Participants had varied views regarding these measures. On hardship allowance, some participants thought that this was a good idea and called for an increase in the allowance. Other participants thought that the allowance was irrelevant to the hardships they faced. Decentralized teacher

recruitment also received varied views with some participants saying it was the best policy for staffing schools in hardship areas. Other participants opposed the policy saying that it engendered corruption, tribalism, and nepotism, and was a threat to national integration.

The study identified three suggestions for improving teacher retention in hardship areas. One suggestion was the need for focused incentives. Participants felt that there was need for incentives that were relevant and particularly relating to the professional development of teachers. Another suggestion was that there was need for inclusiveness in the policy processes relating to identifying hardships and hardship areas. The third suggestion was that there was need for a holistic view of hardship. Participants felt that the current conceptualization of hardship was narrow and failed to capture the complex systemic, political, historical, cultural, and social issues relating to the notion of hardship.

In the following chapter, I will discuss the findings of this study. The discussion will delve into the themes surfaced by the study relative to the literature. A main concern will be to identify where the findings support the literature, where they disagree with the literature, and where they contribute to the literature.

Chapter 5

Discussion of the Findings

This study is nearing the end. "The hunt is over; the game has been brought home and skinned" An important question at the end of the hunt is whether the undertaking was successful or not. Even as hunters celebrate or rue the results of the hunt, as they share out the meat, to be eaten or dried for storage, the hunters share their experiences with each other, with family and friends. From these reflections, the hunters draw important lessons that inform subsequent hunting excursions.

Equally, for this study, this chapter entails a thematic discussion of the research findings presented in the previous chapter. The findings related to the three broad themes of the study, namely, (a) examination of various understandings and experiences of hardship as it relates to the work of teachers in schools in hardship areas, (b) examination of the policy interventions for addressing the hardships, and (c) suggestions for attracting and retaining teachers in the hardship areas in Kenya. While some of the findings conformed to what I had anticipated, some were a surprise. I highlighted those findings in the previous chapter. In this chapter, too, I will revisit those findings and discuss what I think of them in the light of my expectations and in light of the literature.

With respect to understandings of hardship, I found that there were two levels of understandings, namely, the government or the official view of hardship, and the grassroots view entailing the experiences of various stakeholders including teachers, teachers' union officials, and education officials at the local

level. Two policy measures employed by the Kenyan government to attract and retain teachers in remote rural schools included payment of hardship allowance and decentralized teacher recruitment. Participants suggested three interventions for improving attraction and retention of teachers in hardship areas. The suggested measures were focused incentives, a participative and inclusive policy framework, and re-examination of hardship with a view to developing a holistic view of hardship.

From these findings, I was able to distil several themes that I will discuss in this chapter. The themes in this discussion include (a) definitions of rural school hardships, (b) the politics of hardship, (c) decentralization of teacher management, (d) incentives for teachers, and (e) participatory policy-making. In the discussion, I attempt to place the findings within the context of historical, political, educational, and socio-cultural realities and developments that have influenced education policy especially with regard to the development and staffing of schools in remote rural areas in Kenya. Moreover, from a more global perspective, I will discuss the themes in relation to the literature to establish whether, and where, the findings agree or disagree with the literature, and where the findings contribute to the literature. As pointed out in chapter two, the review of literature was not conclusive and, where appropriate, I will be introducing more literature in this chapter. This is because qualitative studies such as this one are flexible and the researcher cannot anticipate all the study findings. Therefore, as Marshall and Rossman (2006) note, it is hard to predict which literature will be

most relevant. Furthermore, such flexibility in qualitative research is what makes the work to "unfold, cascade, roll, and emerge" (Lincoln & Guba, 1985, p. 210).

Defining Rural School Hardships

An important step in the quest to adequately staff, and to develop effective teacher retention strategies, for schools in remote rural areas is to have a clear understanding of the hardships that discourage teachers from applying for postings to such schools, and thus develop a clear interpretive map of what constitutes hardship. Effective policy formulation with regard to attracting and retaining teachers in remote rural schools can only proceed from such a comprehensive interpretive map of rural hardships. Below is a discussion on some of the key issues that I identified relating to hardships experienced by teachers in the so-called hardship areas in Kenya.

Remoteness.

Both this study and the literature on rural schools identify remoteness as a hardship facing teachers in rural schools. The related concepts of ruralness and remoteness appear deceptively easy to comprehend yet they are highly complex and problematic. Cobbold (2006) points out that there is an apparent difficulty in defining the two terms even among researchers and institutions in the same country. There is however some agreement on certain broad variables for conceptualizing rurality and remoteness. These variables relate to demographic, socio-cultural, geographic, and economic factors (Danaher, Moriarty, & Danaher, 2003; Storey, 1993). The conceptual complexities aside, I like Ankrah Dove's simple, yet profound, conceptualization of remoteness. Dove (1982) writes,

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"Remote rural areas are in a very real sense on the periphery, far from the centers of political, economic and cultural life - and in today's world this usually means cities and towns" (p. 5). Such distance, both physical and psycho-cultural, makes the rural areas isolated and thus unappealing to teachers (Collins, 1999; Inverarity, 1984).

In this study, I found that the deficit model of ruralness and remoteness described above largely informs government views and understandings of rural school hardships, and, consequently, the policy framework for staffing schools in hardship areas in Kenya. The policy documents define hardship in terms of harsh climatic conditions, shortage of water and food, community poverty, insecurity, insufficient transport and communication services, and limited availability of social services and amenities (DPM, 2008). Indeed, the Directorate of Personnel Management (DPM) guidelines for determining hardship areas gave higher weighting to remoteness-related criteria such as limited availability and accessibility of food, and limited availability of social services and amenities, both weighted at 25 points. Other criteria such as inadequate transport and communication services, and harsh climatic conditions were equally highly ranked, with a weighting of 20 points.

My analysis of official documents relating to the work of the various task forces tasked with defining hardship areas revealed certain flaws that are worth noting. While the 2008 DPM report points out that the 2003 and 2005 inter-ministerial task forces did a poor job of defining hardship areas, the report appears satisfied that the task force commissioned in 2007 did a better job. This is

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problematic. First, a glaring procedural flaw in the work of the task force is that it only visited areas previously classified as hardship. Among the task force's terms of reference was "to undertake field visits to *identify* (my emphasis) hardship areas" (DPM 2008, p. 3). What the team did, instead, simply amounted to confirming the previously identified hardship areas. Second, it is not clear how the team arrived at the weighting for the different categories of hardship. Why, for example, is unavailability of transport and communication weighted lower (20 points) than social amenities (25 points)? Even more glaring is the incredulously low weighting for insecurity (5 points). This is hardly reflective of the situation on the ground given the rising incidents of tribal clashes since 2002. One therefore wonders whether such weighting was based on tangible evidence, or from preconceived ideas about rural areas. Such glaring contradictions give credence to the observation by the district education official who claimed that the task force ignored the views of the district-based officers.

Teachers and other participants in the study also identified remoteness-related deficiencies as hardships facing teachers in hardship areas. The teachers at Kalamboni secondary school in particular highlighted the following as hardships linked to remoteness: shortage of fresh foods, especially fruits and vegetables, unreliable transport and communication facilities, distance from banks, and shortage of healthcare facilities. This is consistent with the literature on rural school hardships in other parts of the world (Murphy & Angelski, 1996; Sargent & Hannum, 2005; Towse, Kent, Osaki, & Kirua, 2002). In their study on non-graduate teacher recruitment and retention in Tanzania, Towse, Kent, Osaki, and

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Kirua (2002) found that teachers shunned postings to remote rural areas because such areas were associated with lack of social services, diseases, and poor communication. Murphy and Angelski (1996), too, pointed out that geographic isolation was one of the major reasons for teacher turnover in a rural school district in British Columbia, Canada.

However, my findings do not support the assertion in some of the literature (e.g., Storey, 1993) that teachers found rural life inexpensive. As some of the teachers in this study pointed out, the cost of certain basic foodstuffs, water, and charcoal for cooking was quite high. The cost, and convenience, of travel, too, was prohibitive, necessitating the teachers to withdraw a lot of money during their once-a-month trip to the bank.

What I found interesting, however, is that teachers in my study did not dwell much on the issue of remoteness as a hardship, unlike in the literature (Collins, 1999; Hudson & Hudson, 2004; Murphy & Angelski, 1996) where teachers rated remoteness as one of the foremost reasons for their unwillingness to seek postings to rural schools. Indeed, teachers in this study even termed problems such as harsh climate, shortage of food and water, and poor communication as "normal" hardships. This allusion to the hardships as "normal" could be explained by the fact that majority of the population in Kenya, as pointed out earlier, live in rural areas. To these teachers, therefore, the concern with remoteness was more about the limitations it imposed on their professional advancement than it was about physical discomfort. The following quotation from one of the teachers illustrates this view:

Besides the normal problems of food and water shortage, I think working

in a hardship area is professional suicide. Here one stagnates because the

opportunities for professional growth and development are limited.

Moreover, we hardly get information about courses and other important

stuff because we are isolated due to poor communication and transport

means.

This is not to suggest that remoteness did not pose discomfort to the

teachers of Kalamboni secondary school. As indicated by their comments, lack of

health facilities, banks, and adequate transport caused the teachers a lot of

anxiety. However, their emphasis on the effects of remoteness on their

professional lives as opposed to personal comfort illustrates how teachers'

understandings of hardship differ from those of the government.

Social integration.

Consistent with the literature (Coultas & Lewin, 2002; Harmon, 2001), I

found that the degree of social fit was an important consideration for teachers in

determining whether to stay in a remote rural school or to leave. Teachers who

found the community welcoming were more willing to stay than those who did

not make any connections with the community. The experiences of Mr. Kisau and

Mr. Njuguna in particular are very relevant to this theme. On the one hand, Mr.

Kisau was able to make connections in the community, which enabled him to feel

more at home at Kalamboni secondary school. He explained his sense of

satisfaction as follows:

My dream is to make this school my home away from home. Talking of which, one of the teachers in the school is a former student here and he was one of my best students. It is my joy when I see such students. Moreover, I have many friends in the community and some of them even want me to settle here permanently.

On the other hand, Mr. Njuguna found it hard to integrate socially both inside and outside the school due to linguistic differences. Unfortunately, the teachers and the school administration did not make it any easier for Mr. Njuguna by their insistence to converse in the local vernacular, thus his lament that "*…the teachers only converse in Kikamba even in my presence. In some of the staff meetings, too, the principal conducts the proceedings in Kikamba!"*

The literature points out that, indeed, given their social backgrounds, some teachers may not find it fitting to work in a rural environment and would go out of their way to seek postings or transfer to urban schools (Hedges, 2002). Moreover, such teachers "may perceive themselves as strangers among rural people and be unwilling or unable to make contacts in the community" (Dove, 1982, p. 8). Such a situation, however, may not be the case in the Kenyan context, given that the population is largely rural. Nonetheless, the case of Mr. Njuguna surfaces an important issue relating to social fit in Kenya, namely, ethnicity. The issue of ethnicity, especially for teachers from ethnic communities different from the local school community, is particularly important in light of the politics that underlie such ethnic and linguistic differences.

Ethnicity in Kenya has deep political overtones especially rooted in the British imperial policy of divide and rule (Elkins, 2005). Granted, ethnic rivalries existed in the pre-colonial period, but the colonial rulers, and, later, respective post-independence governments, amplified ethnic conflict to keep the country divided into ethnic enclaves. More recently, politically instigated tribal clashes, which began in 1991 and have flared thereafter at the onset of parliamentary elections every five years, have stoked ethnic hostility and brought to the fore deeply held animosities between members of certain tribes. Successive governments and political parties too have stoked ethnic hostilities to punish the tribes that support opposition parties and to evict them from geographic regions where they are ethnic minorities (Abdullahi, 1997). During the 1997 and 2007 post-election tribal clashes, for instance, teachers and even university professors were especially targeted in the clashes. In the Rift Valley in particular, teachers and university professors from tribes that were considered "foreign" in the region were evicted and, in some cases, their homes burnt down (Norling, 2008; Nyukuri, 1997).

In light of the ethnic tensions described above, the discomfort by teachers working in areas outside of their ethnic communities is therefore not only a linguistic or social fit hardship, but also a serious security concern. I can therefore understand Mr. Njuguna's anxiety at being linguistically isolated in the staffroom, as well as his alarm by the hostility displayed by the parents when he insisted on sending his students home to buy mathematics textbooks and mathematical sets. It is instructive, and alarming, that some parents singled him out and described him

as *"a teacher from a rich community."* It was not lost on Mr. Njuguna that such reference to his ethnicity stemmed from a pervasive idea that his community, the Kikuyu, had an unfair control over the country's wealth and politics since independence in 1963. Given such a history of ethnic rivalry, therefore, such comments directed at Mr. Njuguna have profound undertones that would make Mr. Njuguna, and other teachers in similar circumstances, feel insecure.

Unfortunately for Mr. Njuguna and others like him, the insecurity referred to in the government definition of hardship, with a low weighting of 5 points, (DPM, 2008) refers to incidences of cattle rustling in the pastoralist areas and cross-border skirmishes especially in areas bordering Somalia, Ethiopia, and Uganda. As such, the government has yet to recognize and respond to ethnic hostility and prejudice as a hardship for teachers working in remote rural schools.

Nevertheless, Mr. Njuguna's experience of isolation, both in the staffroom and in the community, was a surprise both from the perspective of the literature, and from my experience with rural communities. I had expected stories of excellent bonding among the teachers, as was the case with Mrs. Jimmy, and between the teachers and the community, as recounted by Mr. Kisau. The literature says that in spite of feelings of isolation due to distance from family and professional networks (Crews, 2002), teachers in remote rural schools found comfort in the widespread support they received from colleagues, the administration and community members (Buckingham, 2001; Simmons, 2005).

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Loneliness and distance from family.

Several of the teachers I spoke to at Kalamboni secondary school mentioned loneliness and distance from family as some of the major hardships they faced. Mr. Njuguna's experience epitomized this sense of loneliness when he claimed that for him loneliness began in the staffroom and extended into the evening when he went home:

> *I am lonely, and that is a big hardship for me. My evenings are lonely. I do not take beer, so I stay in my house and watch television – we only receive one channel here. I am lonely in the staffroom, where the teachers only converse in Kikamba even in my presence. In some of the staff meetings, too, the principal conducts the proceedings in Kikamba! When I travel home over the weekends, I am very hesitant to come back here.*

For Mr. Thomas, distance from his family was particularly bothersome as it affected his teaching in that he had to travel back and forth between the school and his parents' home within the week to check on his two young children who were living with his parents. This finding supports studies that identify loneliness and distance from family as major causes of teacher turnover in rural schools (Collins, 1999; D'Plesse, 1992; Inverarity, 1984; Murphy & Angelski, 1996; Proffit, Sale, Alexander, & Andrews, 2004). Moreover, as Murphy and Angelski (1996) found out, teachers chose to stay in a rural posting due to availability of employment for the spouses in the community. The teachers at Kalamboni who were not living there with their families could not have their spouses join them because the spouses had careers that had no openings in Kalamboni. This is

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generally a dilemma for many teachers in remote rural areas where teaching is the only form of formal employment available. For teachers whose spouses are not teachers too, this shortcoming poses a problem. Such teachers as Mr. Njuguna and Mrs. Jimmy had to travel every weekend to be with their families. For Mrs. Jimmy, distance from her husband was not only cause for loneliness, but also a potential threat to her marital stability.

The literature also suggests that newly recruited teachers suffer more from loneliness since they lack the social and professional networks available to more established teachers, and that rural schools tend to be staffed with young unmarried male teachers (Hudson & Hudson, 2008; Proffit, Sale, Alexander, & Andrews, 2004). However, such may no longer be the case in Kenya today as rising unemployment, exacerbated by the government freeze on teacher recruitment, has changed teacher recruitment and deployment dynamics. It is now likely that more married teachers and females will seek postings in remote rural areas and will be likely to remain there for a long time. Mrs. Jimmy and Mr. Njuguna are good examples of this changed teacher deployment dynamic. On the one hand, Mrs. Jimmy sought employment at Kalamboni secondary school because she believed that her chances of employment there were higher. On the other hand, Mr. Njuguna chose to remain at Kalamboni secondary school out of frustration after failing to secure transfer to a school nearer his home. Such married teachers living away from their families are even likely to be lonelier than the young unmarried teachers are.

Weak students.

A surprise finding for me was the claim by several of the teachers at Kalamboni secondary school that having weak students was one of the hardships they experienced. Interestingly, the literature identifies the close working relationship between teachers and students as one of the attractions of working in schools in remote rural areas (Kleinfeld & McDiarmid, 1986; Stokes, Stafford, & Holdsworth, 1999). However, this did not appear to be the case for the teachers at Kalamboni secondary school as they found the quality of their students wanting, as indicated by the following quote from one of the teachers:

> *The students here hardly challenge the teacher. I really do not have to prepare very seriously to teach here. The students hardly ask any questions. This may look easy and good, but it makes one retrogress. I would be happy to teach in an environment where the students are more challenging.*

The teachers spoke of student weakness at two levels, namely, physical and academic weakness. On the one hand, the teachers stated their concern that some students came to school hungry and tired and this affected their academic performance. The teachers cited lack of adequate food, walking long distances to school, and hostile home environments especially for students living with relatives, as causes for physical weakness among the students. As one of the teachers pointed out, such physical weakness affected the students' academic performance:

...When you go to class these are the students you meet and sometimes you may not know the source of their poor performance. At the end of the day, I am not sure if I have assisted my students, as I should.

On the other hand, the teachers concern was about the caliber of their students. In this regard, Mr. Kisau was particularly blunt in his description of the students:

For me, the students are the biggest hardship. We get very academically weak students and yet we are supposed to turn them into university material in four years.

Ultimately, the concern for the teachers is about the welfare and, in particular, the academic performance of their students, and thus their apparent distress at not being able to assist the students realize their ultimate dream – to get admission to university.

The teachers' concern about academically weak students in schools in hardship areas is relevant in the context of the highly competitive and overly examinations-oriented secondary school system in Kenya. Moreover, there is an inordinate obsession among teachers, students, and parents about students proceeding to university, hence Mr. Kisau's talk about the expectation to mould the students into university material in four years. Every year, thousands of secondary school students sit for a national examination, the Kenya Certificate of Secondary Education (KCSE), to compete for the limited vacancies in the countries universities and other post-secondary education institutions. In 2009, for example, 336,600 students wrote the Kenya Certificate of Secondary

Examinations (The Standard 22/10/2009). These students compete for the approximately 10,000 places in the public universities.

Every year, the Ministry of Education publishes a merit list ranking all the public secondary schools in relation to their performance in the KCSE examinations in the daily newspapers. Schools in hardship areas, like Kalamboni secondary school, normally perform poorly in the national examinations and perpetually rank at the bottom of the examination rankings. This is because such schools are normally poorly equipped and staffed. Moreover, unable to provide boarding for their students, they only attract academically weak students drawn from the school vicinity. It is no wonder, therefore, that some parents view such schools negatively and offer little support for their children in those schools, thus the comment by one of the teachers that a student had described the school as a "dustbin" into which her parents had dumped her. Thus, the competitive nature of the Kenyan education system has led to a highly differentiated secondary school system that poses an additional layer of hardship for teachers in hardship areas. Such differentiation, and the attendant inequalities it breeds, is deeply rooted in the historical development of education in the country, which has favoured regions that have enjoyed patronage from the missionary, colonial, and post-independence education authorities (Sifuna, 1990).

Furthermore, the concern about weak students is not just about the welfare of the students, but also about the welfare of the teachers. The promotion of teachers in Kenya depends upon the performance of their students in the national examinations. Given that schools in hardship areas generally perform poorly in

the national examinations, the prospects for promotion for teachers in such schools are considerably poorer than for teachers in the better-endowed provincial and national schools. It is this realization that must have led one of the teachers in my study to comment that *"Working in a hardship area is professional suicide"*. Another participant, an official of the Kenya Union of Post Primary School Education Teachers observed that such a promotion policy was unfair to teachers in hardship areas. Moreover, the poor prospects for promotion caused anxiety for teachers in such schools.

Even more frustrating for teachers in hardship areas is that when it comes to discussions regarding why students perform poorly in national examinations, the community and even the education officials do not seem to recall that such schools are poorly equipped and attract weak students. Indeed several teachers found it absurd that some parents, and even education officials, expected them to work better and produce better results given that they were earning a hardship allowance.

Bruised professional dignity and pride.

Another hardship identified in this study that the literature does not address explicitly is that of bruised professional dignity and pride. The little mention there is in the literature, which is not specific to schools in remote rural areas, is with regard to late payment of salaries in Ghana (Hedges, 2002) and Malawi (Gottelmann-Duret & Hogan, 1998), which imposes hardship on the teachers, especially newly recruited teachers. In addition, such late payment of salaries "reinforces the idea, in the eyes of the teachers and the communities that

they work in, that they are of low status and their work is of little use" (Hedges, 2002, p. 359).

Teachers at Kalamboni secondary school, as well as other participants in my study, stated explicitly that various aspects of teaching and living in a hardship area were a bruise to their professional dignity and pride. Topping the list of hardships in this category were the dilapidated staffroom, shortage of furniture, inadequate toilets, and poor accommodation. Mrs. Jimmy's lament about the teachers' latrine was particularly riveting:

The iron sheets and cardboard used to partition the twin rooms of the toilet are not adequate for privacy. It is very embarrassing when you go to the toilet and another teacher, maybe the principal even, is in the adjoining room. I am particularly anxious when I receive a visitor, always dreading the moment they will ask to use our toilets.

Such a view of these hardships as a dent to the professional esteem of teachers proceeds from the self-identification by the teachers, as well as from the perceptions that community members have of the teachers. There is a general expectation, especially in rural areas where teachers are the most noticeable professionals, that secondary school teachers should maintain a standard of life commensurate with their high level of education. Mrs. Jimmy captured this pervasive view of teachers when she said,

The community expects high school teachers to have a comfortable and well-furnished staffroom. Ours is really a letdown to our professional image.

It is interesting that when I asked the teachers about their first impressions of the school on the day they reported there for work, three of the teachers recalled the dilapidated and poorly furnished staffroom as the one thing that stood out. Like Mrs. Jimmy, the teachers, Kisau, Kitanga, and Njuguna respectively, thought that such a staffroom and its poor furniture were not appropriate for secondary school teachers.

This finding brings to the fore an important feature of the education system in Kenya, and in Africa generally, namely, the elitist attitude that people with university degrees are not suited for the lowly living standards in rural areas. Such elitism has roots in the missionary educational project of isolating children from their primitive rural backgrounds and communities and hence the establishment of boarding schools (Bogonko, 1992). Obbo (2006) provides an interesting description of the missionary project as follows:

> The ideal sites for such a project were boarding schools, where students were removed from the rural and traditional environment and harnessed with trappings of European schooling. All instructions were in English and speaking of vernacular at school was a punishable offence. In some schools students did not go home for holidays but stayed at school to catch up on their studies and perfect their English. The end result was Africans who were unable to face sitting on mats, entering smoke-filled kitchens, or hoeing for hours in the sun. Manual work was despised, even by those who had not been to boarding schools and who may have had only a few years of schooling. This pattern continues today. (p. 158)

One can see traces of such elitist definitions of self in the views of the Kalamboni secondary school teachers about their staffroom. Such elitist views, further fuelled by societal (mis)conceptions about the status of those with a university education, explain why the teachers were ashamed of their staffroom. The dilapidated appearance of the staffroom did not reflect well on their perceptions of self, as well as the community expectations of high school teachers. Mr. Kitanga, for instance, commented that his initial impression of the school was that it looked more like a local primary school. This was because the staffroom was a small room and teachers were using desks similar to the ones used by students. Mrs. Jimmy, on her part, observed that a visitor had confused the staffroom for a dispensary for the students. These observations underlie a thinking that secondary school teachers rank higher than primary school teachers (who are not required to have a university degree) and students and thus deserve higher quality facilities.

Such sentiments on bruised pride, stemming from the perceived elite status of secondary school teachers, resonate with the findings by Hedges (2002) in a study on the perceptions and experiences of the posting process by newly recruited teachers in Ghana. Hedges (2002) observed that newly trained teachers shunned postings to rural schools out of a belief that " if you spend too much time in an isolated village without access to further education, you become 'a village man', a term which strongly conveys the perceived ignorance of rural dwellers in the eyes of some urban educated Ghanaians" (p. 364). Nyerere (1968) decried such elitism as it created a divide between education institutions and society. In

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his essay, *Education for Self-Reliance*, Nyerere argued that secondary schools must not just be used for further selection but "they must prepare people for life and service in the village and rural areas of this country" (p. 281).

Regrettably, universities in Kenya and in particular schools and departments of education have not done anything to address this issue. As some of the teachers pointed out, their teacher education prepared them to teach in "ideal schools" – with adequate teaching and learning resources. Such schools are normally in urban areas or in well-endowed rural areas. Schools in hardship areas, such as Kalamboni secondary school, would hardly be described as ideal. Mr. Kisau, for instance, decried the insufficient preparation that his teacher education program at the university provided:

> *My teacher education prepared me to work in a school with well-equipped laboratories. When I came here the school did not have a laboratory, yet I was supposed to prepare students for the national examinations. Someone should have prepared me for the realities of poor schools in hardship areas.*

Similarly, teachers of languages and humanities bemoaned the fact that they were never prepared to work in situations where students did not have the required textbooks. These observations surface an important aspect about teacher education programs that is relevant to this discussion. This is the fact that besides insufficiently preparing their students for schools in hardship areas, the teacher education programs could be inadvertently preparing their students to work in urban and well-endowed locations. As such, the teacher education programs are

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accomplices in nurturing the elitism 'gene' among prospective secondary school teachers, thus the bruised professional egos of the teachers at Kalamboni secondary school.

Ultimately, it is regrettable that teachers have to work under such uncomfortable conditions where they have to share basic equipment such as chairs and tables, or to undergo the shame of using latrines that do not provide adequate privacy. Whereas poverty and poor management are largely to blame for such shortages, for teachers in hardship areas, such hardships dent their professional dignity and add a layer of difficult to an already problematic situation.

The Politics of Hardship

From the foregoing discussion, an emergent reality is that government and teachers conceptualize and define hardship differently. Whereas such divergent understandings were expected, participants were concerned with the over politicization of the issue of hardship areas, thus the sidelining of the real problems facing teachers and schools in such areas in favour of political sideshows.

One important concern, in this regard, was that there was a lot of political intrigue and meddling in the establishment and demarcation of hardship areas. A good example of such political meddling was the story by a teachers' union official about how, in 1997, the Minister for Education insisted on the inclusion of his constituency, a well-endowed area, in the list of hardship areas before he could ratify the list agreed upon by the Teachers Service Remuneration

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Committee. Following the Minister's example, other members of the committee also ensured that their home areas were also included in the list of hardship areas. Unfortunately, the Directorate of Personnel Management-led task force that reviewed the hardship areas also got embroiled in power issues. As the District Human Resource Management Officer, a member of the task force, explained, issues of rank inhibited deliberations of the task force, with senior officials from Nairobi ignoring and looking down upon their junior district-based officials. Such power-related sideshows relegate the quest for effective policies on staffing schools in hardship areas to the back burner. This concern was well expressed by an official of the Kenya Union of Post Primary Education Teachers (KUPPET) thus:

> *The government views hardship politically. The Directorate of Personnel Management (DPM) should have free rein in the Gazettment of hardship areas. Unfortunately, this is not the case as the process is over politicized and politicians now determine the hardship areas. To clean up the whole process is now very difficult...*

The concern by participants in the study about meddling by Nairobi-based politicians and bureaucrats in the definition and demarcation of hardship areas is indeed about power dynamics within the policy framework. This raises an important question for this discussion, namely, whose view informs policy on hardship areas? For the teachers of Kalamboni secondary school and other grassroots policy players involved in this study, the views of politicians and powerful bureaucrats in Nairobi constitute the officially sanctioned "truth" about

hardship in remote rural areas. Such a view supports the findings by Doecke

(1987) that many of the so-called notions of disadvantage in rural life are

constructed from an urban perspective. Furthermore, as Danaher, Moriarty, and

Danaher (2003) point out, the rural/urban binary positions rural residents as being

"other in relation to, and in comparison with, metropolitan residents, whose lives

and experiences are thereby privileged as constituting the norm against which

nonmetropolitan residents are measured and found lacking or wanting" (p.

134).This is a position that the participants in my study found particularly

problematic as it trivialized and ignored their experiences and understandings of

life in hardship areas. Mr. Naibu expressed such concern when he said, *"hardship

is personal and the government did not consult me regarding the hardships I face

here!"* The two education officials at the district also complained that their

seniors in Nairobi ignored their input regarding the demarcation of hardship areas.

Such an urban bias in defining hardship areas and the challenges faced by

teachers in such areas could lead to misinformed policy interventions. The

payment of hardship allowance, for instance, is a good example of the limitation

of solving rural problems from an urban mindset. As pointed out by several

participants in the study, the hardship allowance did not address the hardships

faced by the teachers. The following comment by a teacher illustrates this

position:

> *My problem is that I am lonely at night; my family is very far away. I also*
>
> *cannot dress to my satisfaction here because of the heat and the dust. The*
>
> *money is welcome but it does not address any of the hardships I face.*

Moreover, as I pointed out in chapter one, at one time in its long history, the hardship allowance paid to teachers included a component for purchasing a refrigerator. Apparently, such a policy did not take into consideration that most remote rural areas did not have electricity or whether, in fact, teachers needed refrigerators. Kincheloe (2008) alludes to the shortcomings of such a unicentric policy framework that privileges only one voice in his observation that,

> From above, the view of what is wrong politically, economically, socially, culturally and pedagogically is abstract, fuzzy, and without a sense of proportion; it often ignores or undervalues the deep emotional and psychological contradictions that make shifting the optic of domination to one of liberation improbable. (p. 64)

Another issue worthy of discussion here is the appropriateness of the term hardship areas as a descriptor for remote rural areas that lag behind other areas of the country in terms of development. A participant observed that the term was a misnomer and that marginalized areas would be the appropriate description. The argument is that the term hardship area, on the one hand, with its focus on harsh climatic and topographical conditions, is misrecognition of the true cause of rural underdevelopment. The term marginalized areas, on the other hand, focuses attention on political and administrative ineptness as the root of many of the so-called hardships in remote rural areas. As politicians in Kenya are fond of saying, communities in the hardship areas have had a disproportionately small share of the "national cake" – a popular reference to national resources. These areas are bereft of the basic indicators of development such as running water, electricity,

tarmac roads, hospitals, schools, and communication networks. Such underdevelopment is the result of faulty policy-making and the politics of patronage that have dogged Kenya since independence. According to the Kenya National Human Development Report (2006) by the United Nations Development Program (UNDP), areas that have been historically disadvantaged in terms of development continue to suffer the brunt of poverty. According to the report, for instance, Central province, which has produced two presidents since independence, has a doctor for every 20,000 people while the arid North-Eastern province has one doctor for every 120,000 people. Furthermore, every child in Central province attends primary school as opposed to one out of three in North-Eastern province.

Harambee (self-help) schools in Kenya are a good illustration of such marginalization in the field of education. Like Kalamboni secondary school, many schools in hardship areas in Kenya began as harambee schools. Harambee is the Kiswahili word for self-help and it describes efforts by communities to initiate their own development projects including schools, health centres, and water projects. The story of harambee schools in Kenya dates back to the colonial period when communities sidelined by the colonial government and the missionaries in the provision of education came together and constructed schools that were known as independent schools. In the post-independence period, the self-help initiative continued and these schools became popularly known as harambee schools. The government initially chipped in by posting some teachers to such schools. Later, the Kenyatta and Moi governments (1963-2002) realized

the political potential in the harambee movement and quickly took over the initiative, with government officers and politicians organizing and presiding over fund raising activities, especially over weekends, to construct schools, health centres and other public utilities all over the country (Mwiria, 1990).

Communities also took advantage of the political interest in the harambee initiative and they initiated all sorts of projects and invited politicians and well-connected civil servants to preside over the fund raising activities. The better-connected communities benefited most from these initiatives. Indeed, the taking over of the harambee initiative from the communities by politicians and government functionaries heralded the institution of "official" corruption in Kenya, with billions of public funds channelled into all manner of genuine and not-so-genuine projects in the name of harambee (Barkan & Chege, 1989).

The import of this story is to point out two related issues. First, the concept of harambee as an empowering tool for communities coming together to start schools is still alive, as the story of Kalamboni secondary school illustrates. Second, the politicization of the harambee movement by politicians and well-connected people in government has meant that poor communities with little or no political capital are disadvantaged with regard to development projects because they cannot organize successful harambee projects. This was Mr. Kivala's sad experience when a fundraiser he organized for the construction of classrooms at Kalamboni secondary school failed miserably. Mr. Kivala explained that unlike schools in the better-developed parts of the country that depended on their influential members of the school board to mobilize the community and other

donors to raise funds, schools in hardship areas such as Kalamboni secondary school had problems constituting the board in the first place.

Even though the government took over the running of all public secondary schools in 1984 and did away with the label of harambee schools, this was more of rhetoric as the government "takeover" only involved posting teachers to the schools. Parents and school boards have to fund the construction of the physical facilities, which, as the Kalamboni secondary school PTA chair pointed out, is a hardship for poor rural schools. Moreover, such schools often have to hire their own teachers as the government-posted teachers refuse to take up the postings. The schools can hardly bear this huge financial constraint.

Decentralized Teacher Recruitment

As pointed out in the previous chapter, the Kenyan government introduced decentralized teacher recruitment in 2001 as one way to ensure retention of teachers in hardship areas. Decentralized teacher recruitment in Kenya is part of the wider policy on decentralization of education that has been in effect since the mid 1990s which is, as in other countries in Africa, part of wider reforms towards decentralization of government (Gershberg & Winkler 2004). Both internal and external forces have motivated decentralization of education in Kenya. The external forces include institutions such as UNESCO, the World Bank, and the International Monetary Fund (IMF) that have supported decentralization in the education sector for quite some time (McGinn, 1997). Internally, decreased financial capacity has led to the need for cost sharing and thus more involvement by the public in areas that the government previously funded (Kiveu & Mayio,

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2009). Going by the conversations I had with various participants in this study, decentralized teacher recruitment as a strategy for redressing teacher shortage in hardship areas in Kenya is a contentious issue.

Following Fiske (1996) and Rondinelli (1981), decentralized teacher recruitment in Kenya falls within the description of administrative decentralization and entails aspects of both deconcentration and delegation. Within this arrangement, the Teachers Service Commission retains overall control over teacher management while delegating the assignment of interviewing prospective primary and secondary school teachers to District Education Boards and school Boards of Governors respectively.

Even though there is no universally agreed upon model of decentralization, it is clear that deconcentration and delegation provide less power to the grassroots education authorities and are weaker variants of decentralization (Winkler, 1989). This explains why participants in the study questioned the commitment by the Kenyan government to grant any meaningful powers to the school Boards of Governors. In fact, several participants felt that the Teachers Service Commission was cleverly avoiding the strain of carrying out the interviews while in effect maintaining a stranglehold on the process by providing very restrictive guidelines to the Boards of Governors. Mr. Kivala, the school principal, described the so-called decentralized teacher recruitment policy as *"just another government project"*. This was because the guidelines provided by the Teachers Service Commission for interviewing prospective teachers gave the school Boards of Governors only 5% of the marks to work with while 95% of the

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marks were already predetermined. This, according to Mr. Kivala, constrained the Board of Governors' ability to identify and recruit teachers suited to the particular needs of schools in hardship areas.

This apparent inertia on the part of the Teachers Service Commission to embrace more far-reaching decentralization is, in my opinion, reflective of the broader political mindset that favours political centralism. For instance, the Kenyatta government (1963-1978), the first post-independence government in Kenya, quickly dismantled the pre-independence democratic and liberal political system that had sustained the independence struggle effort and replaced it with an oppressive one-party system with an all-powerful president. The second republic, under president Moi (1978-2002), despite its pretensions at democracy, and despite Moi's oft-voiced preference for decentralized governance (Barkan & Chege, 1989), perfected the one-party dictatorship. The current government, which came to power in 2002 on the platform of a more democratic dispensation, has done little to shift the political thought system from the yoke of authoritarianism. Indeed the power sharing arrangement between President Kibaki and Prime Minister Raila Odinga, the result of the National Accord and Reconciliation Agreement of February 2008, has led to more confusion and uncertainty among the population.

Decentralized teacher recruitment in Kenya is, therefore, symptomatic of a political framework keen on maintaining absolute control while outwardly maintaining a façade of participatory and decentralized governance, leading to what Mundy (2008) calls highly scripted forms of participation. This is consistent

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with the findings by Naidoo (2005) that African countries have tended to decentralize the management of education with limited authority to the local authorities.

As I found in this study, there exist, too, administrative and structural bottlenecks that limit successful implementation of decentralized teacher recruitment in the hardship areas. A major handicap in this regard is the apparent administrative incompetency of school Boards of Governors. Several participants raised concern about the capacity of school Boards of Governors to interview prospective secondary school teachers given that many of the board members, especially for schools in remote rural areas, have very low academic qualifications while the teachers are university graduates. Mr. Thomas, citing his own experience when the board interviewed him for a teaching position, recalled that

> *The BOG members in the panel were very passive. I thought they only asked questions because they had to speak. The principal and the teacher on the panel asked almost all the questions. I got the sense that the BOG members had been guided by the principal on what to ask.*

Previously, the management of schools was centralized and was predominantly the concern of the Ministry of Education and the Teachers Service Commission. Within such an arrangement, school Boards of Governors were more symbolic than instrumental. With the introduction of decentralization, and especially decentralized teacher recruitment, it has become very necessary for school boards to comprise members who have superior administrative and

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intellectual competencies. The assertion by participants that School Boards of Governors were corrupt, inefficient, inaccessible, and overly controlled by the school principal is consistent with literature on school management in Kenya (Abagi, Owino, Sifuna, Waga, Ngome, & Aduda, 2000; Republic of Kenya, 1999). Notably, a report by a commission of inquiry into the education system in Kenya (The Koech Report) pointed out that many secondary schools in the country had incompetent Boards of Governors. The report blamed this on several factors, namely, political interference in the appointment of the members, low level of education, and lack of commitment on the part of the majority of the board members (Republic of Kenya, 1999).

The administrative problems described above are especially pressing for remote rural schools that, as Mr. Kivala pointed out, find it difficult to constitute a Board of Governors as many eligible individuals live in urban areas and are not keen to participate in village issues. As Mr. Kivala pointed out, schools in hardship areas are therefore forced to do with the locally available people who may not be so resourceful more so when it comes to interviewing prospective teachers. Shortage of administrative and managerial capacity among local and school authorities is a pervasive problem in Africa (Naidoo, 2005) and it affects the quality and pace of decentralized teacher management. Ultimately, however, there is need to address with caution the issue of excluding or dismissing the potential contribution of "illiterate" members of local communities in school management. This is because such exclusion could be informed by the very elitist tendencies that decentralization is meant to redress.

An interesting discussion during the study was the issue of localized recruitment in the sense of targeting teachers from the local area. Previously, the Teachers Service Commission posted teachers to any part of the country. Participants felt that this practice was the cause of teacher shortage in hardship areas and that decentralized teacher recruitment opened a window of opportunity for such schools to get teachers by recruiting locally. Indeed, this could have been the intention of the policy shift all along, especially considering the guidelines that allocated a maximum of 25 marks for previous teaching experience in the same school under the Board of Governors. Realistically, only individuals from the vicinity of a remote rural school would have had the opportunity of working in such a school on part-time basis, an opportunity normally utilized by university students during their holidays. Officials of the Kenya National Union of Teachers were especially emphatic that recruiting locally would ensure that the schools got teachers who were committed to staying in the area:

> *We want our own! We as a district have been disadvantaged for a long time with regard to the supply of teachers. When recruitment was centralized, we used to get teachers posted here but many never reported, and those who reported ended up going away. Our schools were perpetually understaffed. With decentralized recruitment, we employ our own and they are willing to stay.*

This thinking is in line with literature on staffing rural schools that advocates recruiting locally (Cobbold, 2006; Hammer et al., 2005) or recruiting teachers with a rural background (Kannapel & DeYoung, 1999; Storey, 1993).

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Storey (1993) says that such teachers are more likely to stay in a rural posting, as "their rural perspective may be helpful in accepting and enjoying constraints of rural life" (p. 166).

However, given the sensitive nature of ethnic politics in Kenya, recruiting teachers locally is problematic. Several participants voiced reservations about the practice, arguing that it would foment ethnicity and even clanism. Officials of the Kenya Union of Post Primary Education Teachers were especially opposed to such a practice, especially in light of the ethnic hostilities following the 2007 general elections, arguing that it would be a huge setback to the gains made towards achieving national unity. Individual teachers, too, opposed localized recruitment arguing that it would lead to inbreeding thus defeating the broad education objective of fostering national unity.

The foregoing, however, does not mean that decentralized teacher recruitment lacks merit. Some participants supported the policy, arguing that it should indeed be strengthened. An immediate benefit is that remote rural schools now have some measure of control over teacher recruitment and are, at least, assured that the teachers they recruit would report for work. The District Human Resource Development Officer highlighted this when he said,

> *We are now sure that the newly recruited teachers will be in a particular school for at least five years before they start disturbing us with requests for transfer. The five years is enough to see the teacher take a whole cohort through secondary school. This is good for the students especially,*

and for us too, because it brings some stability in the staffing of rural

schools.

Previously, teachers posted to such schools under the centralized system

hardly ever reported. The literature on staffing of rural schools in Africa notes that

this is a problem experienced in other countries (Hedges, 2002). Hedges further

notes that such teachers may end up being reposted to schools of their choice thus

defeating government efforts to distribute teachers fairly. Moreover, as one

participant in the study observed, the new practice afforded an opportunity for

both the teacher and the Board of Governors to meet and chat prior to the

teacher's appointment. As such, the board has a sense of the kind of teacher they

are recruiting while the teacher has an idea of the school they are going to be

working in.

In a way, decentralized teacher recruitment offers teachers choice over

where to work. Mrs. Jimmy's comment "*I chose to come and work here and I*

have a duty to be a positive role model especially for the girls in the school" is

illustrative of such choice. Previously, teachers would be posted to any part of the

country where there was a vacancy. Indeed, the appointment of teachers was

subject to willingness to serve in any part of the country where their services were

most required. This was a control mechanism, albeit a weak one, by the Teachers

Service Commission to ensure that hard-to-staff schools, especially in the

hardship areas got teachers.

However, even though decentralized recruitment apparently gives teachers

choice over their deployment, there still remain vestiges of control by the

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Teachers Service Commission in the form of the requirement that newly employed teachers serve for a minimum of five years in a particular school before seeking transfer. As teachers in the study noted, getting transfer, even after the mandatory five years, is not an easy task. Under such circumstances, the sincerity and quality of "choice" therefore becomes questionable and it may as well be that the decentralized system of recruiting teachers is a crafty way of forced deployment. The literature on teacher deployment for rural schools identifies forced deployment and transfers as a method of ensuring equitable distribution of teachers especially in the developing countries (Gottelman-Duret & Hogan, 1998; Mulkeen & Chen, 2008; Samuel, 2002). Teachers in my study suggested that a way out of this impasse was to have a policy that allowed teachers unconditional transfer after the mandatory five years. Such a policy would augur well with the argument by Dove (1982) that, "for people considering teaching as a career, whether or not they are compelled to teach in remote schools, when and for how long may well be decisive factors in their career choices"(p. 7).

From my analysis, decentralized teacher recruitment in Kenya is a move in the right direction in the quest for sustainable interventions to the perennial shortage of teachers in the hardship areas. What is problematic, however, is that the policy has come at a time when there is widespread unemployment due to the government freeze on employment in the public sector. It may therefore not be easy to determine whether those recruited to teach in the hardship areas have made their choice due to genuine commitment to teach in such areas, or due to the

pressure of unemployment. For now, anyway, the policy is still in its infancy and there will be need for evaluative studies along the way to determine its efficacy.

Incentives for Teachers

The literature on deployment of teachers in rural schools identifies the use of various forms of incentives to attract and retain teachers in such schools (Gaynor, 1998; Hammer et al., 2005; McEwan, 1999; Schwartzbeck et al., 2003; Zambia Country Report, 2000). Such incentives include salary bonuses, longer vacations, loans to purchase houses, free housing, salary increases, travel allowance, student loan repayment relief, and relocation assistance among others. These incentives fall under the deficit model (Dove, 1982) which views rural life as harsh, deficient, and problematic, thus necessitating some form of compensation.

In Kenya, the education authorities have only relied on financial incentives, namely the payment of hardship allowance to attract and retain teachers in schools in hardship areas. From the comments of the teachers especially, it was evident that the hardship allowance was, largely, irrelevant to the hardships they experience and they would have preferred incentives that were more relevant to the hardships they experienced. The following comments by two of the teachers capture the sentiments of the majority of the teachers involved in the study regarding the hardship allowance:

> *My problem is that I am lonely at night; my family is very far away. I also cannot dress to my satisfaction here because of the heat and the dust. The money is welcome but it does not address any of the hardships I face.*

...hardship is personal and the government did not consult me regarding the hardships I face here! What should compensate for hardship is not money.

These observations agree with the literature on incentives for rural teachers that financial incentives, though widely used, are problematic. Holloway (2002) observes that salary alone is not enough to guarantee that a teacher will stay in an isolated region, citing the case of Wyoming, USA, where, despite high salary increases, "overall teacher attrition continued to climb upward as teachers transferred from the western part of the state and into schools located near larger towns" (pp. 144-145). In Ghana, a scheme entailing payment of full tuition fees by the government to attract students from remote rural areas into teaching did not succeed and, as Cobbold (2006) suggests, "more attractive incentive packages are needed to entice teachers to stay in rural schools for a relatively long time" (p. 464). Dove (1982) suggests that compensatory strategies are, at best, short-term and only meant to attract teachers to schools where they would not have otherwise considered teaching.

However, financial incentives can influence a teachers decision to work and stay in a rural posting. An interesting finding from my study was that the hardship allowance contributed to teacher retention in hardship areas, albeit in a way that the government did not envision or intend when it initiated the policy. As the District Human Resource Management Officer explained, the increased earnings from the hardship allowance enabled teachers to secure bigger loans from banks, which in turn meant that they could not leave the hardship areas until

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they had repaid the loans. Moreover, some teachers, such as Mr. Njuguna, supported the payment of hardship allowance arguing that it made a noticeable difference to their income:

Surely, I am getting a lot of money. By the end of this month, I will be at the top of my job group, and 30% of that is very good money. Even though I would love to transfer, I have made good use of the extra income occasioned by the hardship allowance as collateral to secure loans from banks and other financial institutions.

This finding agrees with findings by Storey (1993). In the study, 42% of teachers in a rural school district in British Columbia indicated that the Forgivable Loan Program opportunity offered by the district influenced their decision to accept the offer of employment. None of the teachers, however, indicated that it was the most important factor.

When I asked participants in the study to suggest incentives for attracting and retaining teachers in hardship areas in Kenya, a common thread in their responses was the desire to have incentives that were relevant to the hardships experienced by teachers such as adequate housing. Furthermore, such incentives would also have to be meaningful to the professional lives of the teachers. In this category would be incentives such as automatic promotion after working in a hardship area for a stipulated number of years. These suggestions concur with those of Hammer et al. (2005) about using incentives strategically to target local challenges. Lowe (2006), furthermore, argues that incentives "should be available

to teachers throughout their tenure with the school district" (p. 29) to ensure retention.

Some of the teachers, such as Mrs. Jimmy, also identified good administration as a reason that motivated them to stay. I would therefore add good administration in the list of non-financial motivators. Furthermore, while raising concerns about the dilapidated appearance of their staffroom, inadequate furniture, as well as inadequate toilets for teachers, the teachers were not just bemoaning the poverty of their school but more so, inept administration that foregrounded student welfare at the expense of teacher welfare. Good administrative practices would take care of such basics. As well, good administrative practices would also ensure sensitivity to cultural and linguistic differences, thus avoiding situations where teachers like Mr. Njuguna felt isolated because they did not speak the local language. It was rather unfortunate that the principal, who should know better, actually conducted meetings in the local vernacular. No amount of hardship allowance could ever address lack of hospitality.

The above-suggested incentives relate to Herzberg's (1966) hygiene factors. According to Herzberg (1966), factors such as salary, job security, working conditions, quality of management, organizational policy, administration, and interpersonal relations, though not intrinsic to the job, are important elements as they can easily lead to dissatisfaction. Herzberg called them hygiene factors because they can be managed by the use of "hygienic" administrative processes.
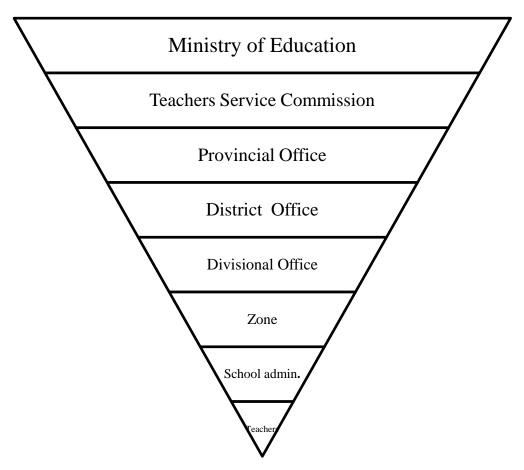
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Participatory Policy-making

Various participants in this study suggested the need for a more inclusive and participative approach in the quest for lasting solutions to the problem of staffing schools in hardship areas in Kenya. As pointed out earlier, many of the participants felt that the policy process for addressing issues affecting teachers in hardship areas excluded the views of grassroots stakeholders and especially the concerned teachers thus the suggestion for an inclusive and participative policy framework. Participants pointed out that their views and experiences were not considered in various processes such as the identification and naming of hardships experienced by teachers in the hardship areas, naming of the hardship areas, identification of appropriate incentives for teachers in hardship areas, and implementation of decentralized teacher recruitment.

Hitherto, the Government of Kenya has dealt with the problem of staffing schools in hardship areas in what I would term a "closeted" manner. The approach adopted in the various efforts to redress teacher shortage in hardship areas, spearheaded by the Teachers Service Commission (TSC), the Ministry of Education, and the Directorate of Personnel Management (DPM), has created the impression that the problem is exclusively a government concern, and that other stakeholders play only a supporting role. Interestingly, according to TSC documents, the objective of decentralized teacher recruitment was to increase grassroots stakeholder participation (TSC, 2006) in the recruitment and supervision of teachers. However, as Mr. Kivala, the school principal, clearly explained, little had changed as grassroots participants still had very little leeway

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in the exercise. This stance is symptomatic of the highly hierarchical and

predominantly top-down policy framework for managing teachers in Kenya (see

figure 5.1 below).

Figure 5.1 *Teacher management policy framework in Kenya*

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                    Ministry of Education

                 Teachers Service Commission

                    Provincial Office

                    District  Office

                    Divisional Office

                        Zone

                    School admin.

                      Teacher
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Within this framework, decisions made at the top levels of the hierarchy, in other

words, at the Ministry of Education or TSC headquarters rarely have any

meaningful input from the grassroots. This top-down framework proceeds from

the regulative style of policy-making, which is the hallmark of the rationalist

model of policy-making (Head, 2008; Schneider & Ingram, 1997). This

framework, which emphasizes scientific knowledge and rational, top-down, and

unicentric decision-making, has been the bane of policy-making in government

and the public sector in many parts of the world. This is because, as Geurts and Joldersma (2001) argue, the framework assumes that government could and should regulate other policy actors, and that, indeed, policy-making is the government's responsibility, whereas the other actors should implement government decisions.

Whereas this technocratic approach to policy-making could be effective and efficient in certain circumstances, especially in dealing with problems that are "discrete, bounded, and linked to particular sets of information and actors" (Head, 2008, p. 4), it is severely limited in addressing problems that are complex and crosscutting. As participants in my study pointed out, the issues involved in staffing schools in hardship areas in Kenya are varied and complex and the quest for lasting solutions should necessarily be inclusive of the various stakeholder voices and experiences. Mr. Naibu captured this most succinctly in the following comment:

> *This is a case of a shoe with many wearers; the pinching points are varied... The expertise of surveyors, economists, farmers, policy analysts, and educationists would inform a more broad definition of hardship thus allowing for appropriate policy responses to the problem of teacher shortage in remote rural areas.*

In line with Mr. Naibu's contention, each of the grassroots stakeholders in my study felt that they had good working knowledge of the problems and issues affecting the work of teachers in hardship areas and thus needed a more active role in the decentralized teacher recruitment process. Officials of the Kenya

National Union of Teachers, for example, staked their claim on their close links with the teachers in the hardship areas:

> *We strongly feel that the union branch officials should be major players in this endeavour. We are more in touch with the grass roots and thus in a better position to understand the problems teachers face and to advise government accordingly.*

Individual teachers too argued for inclusion, stating that they had unique experiences and contributions that could inform policy on staffing schools in hardship areas. Mr. Naibu's assertion that *"hardship is personal and the government did not consult me regarding the hardships I face here"* speaks to this claim. Whereas the literature on decentralization of education describes teachers as playing the role of implementers of education policies and directives, unfortunately, it is common for governments, district and school-level education managers "to forget that teachers are stakeholders in their own right" (Mpokosa, Ndaruhtse, McBride, Nock, & Penson, 2008, p. 42). The proposal by the teachers to constitute teacher-heavy teams for the recruitment of secondary school teachers highlighted their desire to play a key role within a participatory policy framework. Besides contributing their expertise to the project of staffing schools in the hardship areas, such participation would enhance the teachers' self-confidence as well as their status in the eyes of the community (Stacki, 2002).

From my interaction and conversations with the various grassroots stakeholders, I got the sense that they were content with the TSC playing a facilitative role within the proposed participative policy framework provided they

were afforded space whereby their views would be given due attention and discussed. Such an arrangement is what Fung and Wright (2003) call empowered participatory governance, a framework that privileges bottom-up participation while at the same time recognizing the need for coordination and supervision by a strong central body. As it is, at present, the role of the TSC in the decentralized teacher recruitment process is more controlling than facilitative.

The call by the participants in this study for a participative policymaking framework finds support in various theoretical and epistemological traditions. Foremost, with respect to the Kenyan context, is African traditional epistemology. Other theoretical frameworks supporting this call include participation theory, motivation theory, and organizational management theory. Given the Kenyan context of this study, traditional African epistemology is, in my opinion, an important platform for grounding a participatory policy framework. This is because such a framework would not be alien as, indeed, participation and inclusion are central to African traditional epistemology and community life (Masolo, 2004; Mbiti, 1990; Wiredu, 2004). The existence of community-initiated (harambee) schools such as Kalamboni secondary school is testimony to such participatory and grassroots (inclusive) approaches to development.

Within participation theory, public sphere theory proponents (e.g., Fraser, 1990; Habermas 1992), for instance, would see this as a call for a discursive public sphere, a space that epitomizes the virtues of inclusiveness, participation, openness, equality, and freedom. Other participation theorists (e.g. Freire, 1997) advance the idea that participation is value in itself.

Within organizational management theory, participation is seen as an important ingredient in organizational productivity and employee satisfaction (Doucouliagos, 1995; Miller & Monge, 1986; Nurse & Devonish, 2008; Ouchi, 1981). Moreover, as Chambers (1998) points out, participation resonates well with the "post-modern understanding of multiple realities, and the recognition that professional realities are constructed differently from those of local people" (p. 280). Literature on policy-making in public sector governance points out that participation is related to the assumption that government should be seen to be "in the middle of all other stakeholders with a two-way relationship occurring between the actors and government" (de Jong, 1996, p. 166). Finally, participation is an ideal supported by motivation theory, especially by Kamenetzky (1992) and Max-Neef (1992) whose holistic approach to human needs posits that participation is a necessary ingredient in any quest to satisfy human needs.

That said, however, I am cognizant of the fact that participation, as Mefalopulos (2003) contends, is a function of power, or powerlessness, and thus a contested terrain. As I found out in this study, the nature and quality of participation in the decentralized teacher recruitment project in Kenya has been constrained by power issues at different levels. For instance, the District Education Officer pointed out that power struggles between the two teachers' unions often disrupted deliberations at the District Education Board:

> *...they are always bickering over one thing or the other, which interrupts our meetings. Officials of the Kenya National Union of Teachers are especially confrontational, particularly during the recruitment of primary*

school teachers. They bang tables and punch the air. They take advantage

of every meeting we call to antagonize us. We are not pulling in the same

direction.

At the school level, complaints by the teachers about the quality of the

school board, and the questionable capacity of some of the board members to

interview prospective high school teachers, speak to underlying power issues.

Finally, there are apparent power issues within government as indicated by the

education officials at the district. It is instructive that the officials felt sidelined by

their own employer. The officers, for instance, expressed frustration that their

seniors in Nairobi ignored their advice regarding the demarcation of hardship

areas. Moreover, the officers complained that operations of the government task

forces that studied the issue of hardship areas were side tracked by issues of rank

and protocol, and that the Nairobi-based senior officials in the task forces looked

down upon the contributions of the junior rural-based officers.

Given the contested nature of participative policy processes (Dryzek,

2000; Huxley, 2000; Stacey, 2007), one could rightfully question the quality of

the proposed participation by grassroots stakeholders, and whether that in any

way diminishes the control by central government over the whole process.

However, I argue, together with Gaventa (2006), that an important element of

participatory governance is the democratization of the debate itself. More

importantly, participation, viewed from a tradition African epistemological

perspective, privileges dialogue over power or numbers (Wiredu, 1995), allowing

the minority a chance for their opinion to shape the decision. This process thus leads to communal ownership of the decision (Mbiti, 1990).

In the context of this study, therefore, the import of participative policymaking is to tap into the experiences of all the relevant stakeholders in the continuing search for workable solutions to the problem of staffing remote rural schools. Such an approach will allow for different entry points, based on different contexts, thus avoiding the one-size-fits-all policy blueprints that have hitherto been favoured by government. The informed contributions by participants in this study are a pointer to the prospects of such a participatory policy framework.

Summary

This chapter has entailed a thematic discussion of the findings of the study. The themes discussed included (a) definitions of rural school hardships, (b) the politics of hardship, (c) decentralization of teacher management, (d) incentives for teachers, and (e) participatory policy-making. I discussed the themes within the context of historical, political, educational, and socio-cultural realities and developments that have influenced education policy especially with regard to the development and staffing of schools in hardship areas in Kenya. More importantly, I discussed the findings in light of the literature, highlighting where the findings agreed, or disagreed, with the literature, and where the findings contributed to the literature. Below (Table 5.1) is a summary of the findings and their connections with the literature.

Table 5.1 *Summary of findings and connections with literature*

Theme	Literature supporting	Literature not supporting	New
Hardship			
Shortage of Food/Water	Collins, 1999; Murphy & Angelski (1996); Hudson & Hudson (2008);		
Loneliness	Collins, 1999; Inverarity (1984)		
Insecurity		Boylan & McSwan, 1998; Murphy & Angelski, 1996	
Poor prospects of promotion	Towse et al. (2002)		
Inability to leave/transfer	VSO (2002);Cobbold, 2006		
Dissatisfaction with pay and workplace conditions		Storey, 1993; Hudson & Hudson (2008)	
Problems with rural lifestyle		Boylan & McSwan, 1998; Harmon, 2001; Storey, 1993	
Weak students			✓
Climate/remoteness	D'Plesse (1992); Inverarity (1984); Murphy & Angelski (1996);		
Linguistic/social integration	Coultas & Lewin (2002); Harmon (2001)	Buckingham, 2001; Simmons, 2005	
Inadequate housing	Schwartzbeck et al. (2003)		
Community poverty	Schwartzbeck et al. (2003)		
Bruised pride			✓
Administrative hardships ✓ Teacher shortage ✓ Teaching outside specialization ✓ Managing border areas	Boylan, 1998; Cobbold, 2006; Menlo & Poppleton, 1990; Mulkeen 2006; Schwartzbeck et al. (2003)		✓

Theme	Literature supporting	Literature not supporting	New
Motivation to stay			
Good relations with administration.	Murphy & Angelski (1996)		
Commitment to teaching	Boylan & McSwan (1998); Sargent & Hannum (2005		
Rural background	Storey (1993); Collins (1999); McSwan (1998)		
Satisfaction with students	Kleinfeld & McDiarmid (1986	Collins, 1999; Haughey & Murphy, 1985; McSwan, 1998;	
Interventions			
Hardship allowance	Zambia Country Report (2000); Hammer et al. (2005)		
Decentralized/targeted recruitment	Hammer et al. (2005)		
Suggested interventions			
Targeted incentives	Hammer et al. (2005)		
Inclusive policy machinery	Chambers (1998);de Jong (1996); Nurse & Devonish, (2008)		
Holistic view of hardship			✓

Chapter 6

Overview, Conclusions and Recommendations

"You are here to be seen not to be heard!"

A daily ritual, nay, a roar

Heralding the start of the school day

To be seen.

Never to be heard.

A dictum that marked an entire school life

The teachers spoke. We listened

But it wasn't always like this, no it wasn't

Long time ago, when we still had our own names

Before they became middle initials

Back then, everyone listened, everyone spoke

We sat under a tree, to listen and speak, to one another

When we disagreed, we sang and danced, and ate, under the tree

Then sat again, under the tree

Under the tree, everyone had their turn

To be seen

To be heard.

Overview

My intent in this study was to examine the policy framework for attracting and retaining teachers in hardship areas in Kenya. A major undertaking, in this regard, was to examine what constitutes hardship as it relates to teaching in remote rural schools in Kenya. Key understandings of hardship were sought from government policy documents as well as from lived experiences of rural teachers and other grassroots policy players such as teachers' union officials and local education officials. The study also examined the policy interventions in place to

attract and retain teachers in hardship areas, as well as the views of the participants regarding such measures. Finally, I sought suggestions from the various participants on possible interventions for staffing schools in hardship areas.

I adopted a critical interpretive research design, utilizing personal and group interviews as well as document analysis, purposely to engage in an in-depth interrogation of the concept of hardship. The site of the study was Kalamboni secondary school located in Makueni district, one of the hardship areas in Kenya. Over a period of three months, I held several in-depth conversations with five teachers at the school, as well as a group discussion with all 12 teachers in the school. Other participants included the school principal, deputy principal, PTA chair, the branch executive officers of the two teachers' unions, and two district education officials. I also reviewed policy documents at the Teachers Service Commission and the Directorate of Personnel Management relating to teacher management in general, and specifically to staffing schools in hardship areas. Data were analyzed and discussed thematically.

The findings revealed that the government and the various grassroots policy stakeholders had different conceptualizations and understandings of hardship. While the government definition highlighted problems such as shortage of food, water, social amenities, and insecurity, the teachers and other participants foregrounded hardships such as administrative problems, loneliness, bruised professional pride, and weak students. The definition and demarcation of hardship areas is also problematic due to meddling by politicians and senior government

officials (e.g., the inclusion of well-endowed areas in the list of hardship areas at the instigation of senior government officials).

With regard to policy interventions, at the time of data collection, the government had instituted two measures, namely, payment of hardship allowance and decentralized teacher recruitment. The majority of the participants felt that the hardship allowance, though welcome, was generally irrelevant to the hardships experienced by teachers. Decentralized teacher recruitment, too, was seen as problematic largely because the government guidelines allowed the school boards of governors very little leeway. Moreover, the policy was said to have huge potential for engendering corruption and nepotism. Suggested interventions included focused incentives, an inclusive policy framework for staffing schools in hardship areas, and a holistic conceptualization of hardship.

Conclusions

Limited conceptualization of hardship.

The findings of this study show that, at the policy level, there is limited conceptualization and understanding of what constitutes hardship for teachers in remote rural areas in Kenya. The official definition of hardship, limited to climatic and infrastructural deficiencies (remoteness, shortage of food and water, insecurity, and shortage of social amenities), is narrow and limited in that it is not inclusive of the experiences of teachers as well as other grassroots policy stakeholders.

Hardships experienced by teachers in remote rural schools are varied and complex, often entailing deeper and more nuanced personal, social, cultural,

pedagogical, and even political issues. Such hardships, including weak students, poor prospects for professional advancement, bruised professional pride, isolation, and shortage of teaching and learning facilities, are not reflected in the official definitions of hardship. The apparent mismatch between official and grassroots understandings of hardship could be attributed to a policy framework informed more by an urban perspective of rural life than by a detailed interrogation of what constitutes hardship for teachers working in remote rural areas.

Interventions have not been effective.

Arising from the limited conceptualization and definition of hardship, the interventions for attracting and retaining teachers in hardship areas, namely, payment of hardship allowance and decentralized teacher recruitment have not been effective. Participants in this study faulted the mentioned policy interventions saying that such interventions did not adequately address the real problems facing teachers and schools in the hardship areas. Moreover, it appeared to me, from my research interactions and observations, that there was very little connection between the policy measures taken by government to attract and retain teachers in hardship areas and the decisions by teachers to remain or to leave.

Hardship allowance does not address the hardships experienced by teachers. Findings from this study show that the hardship allowance paid to teachers in hardship areas is not relevant to the hardships experienced by the teachers. It is indeed foolhardy that the Teachers Service Commission has continued to use hardship allowance as a way of attracting and retaining teachers

in hardship areas even when it was apparent that the allowance was having little, if any, effect in that regard. This is, in my opinion, indicative of bureaucratic laxity, and a teacher management framework that is hesitant, or unable, to explore more strategic and innovative policy options for attracting and retaining teachers in the hardship areas.

Nevertheless, financial incentives could still work to attract and retain teachers in hardship areas. The finding that some teachers and other participants found the allowance attractive, and that in some cases, it led some teachers to stay longer in hardship areas provides a window of opportunity for policy makers to think of creative ways of using financial incentives.

Ultimately, my argument is that hardship allowance should be one of several incentives for attracting and retaining teachers in hardship areas in Kenya. This is because, as the findings have shown, problems facing teachers in the hardship areas are multidimensional and thus a package of solutions that addresses as many of the dimensions of the problem as possible is required.

Decentralized recruitment nothing more than delegation. The decentralized teacher recruitment initiative, meant to increase stakeholder participation in the recruitment and management of teachers, has done little in the way of ceding power to the secondary school Boards of Governors. Participants in this study were very forthright that the much touted decentralization was nothing more than a ruse by the TSC to delegate the laborious task of interviewing teachers while in essence retaining full control over teacher recruitment. The teacher recruitment framework, as it is, is still centralist with the TSC retaining

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most decision making authority. As such, the various grassroots stakeholders - teachers, school administrators, teachers' union officials, and education officials at the district level - expressed dissatisfaction with their level of involvement in the so-called decentralized teacher recruitment process.

Competence of school boards is questionable. This study surfaced questions about the legitimacy and competency of school Boards of Governors to interview prospective secondary school teachers. Such questions implicate the efficacy of the decentralized teacher recruitment project. As presently constituted, school Boards of Governors, particularly for schools in hardship areas may not be the ideal authority for interviewing prospective secondary school teachers. This is because, as participants pointed out, the board members may not have the prerequisite skills and competencies to undertake such an exercise. While it is appreciated that such schools find it hard to constitute their boards owing to shortage of qualified members, an exercise as important as teacher recruitment should be conducted by panels that both the prospective teachers, as well as the larger school community, have confidence in.

Unclear ownership of the decentralized recruitment project. There appears to be a vacuum regarding the ownership of the decentralized teacher recruitment project. On the one hand, the Teachers Service Commission appears content that decentralized teacher recruitment implies more control by the school Boards of Governors and District Education Boards. On their part, however, the school Boards of Governors and the District Education Boards accuse the

Teachers Service Commission and the central government of ceding very little decision-making power to them.

Overall, nevertheless, the findings intimate that decentralized teacher recruitment in Kenya is a move in the right direction in the quest for sustainable interventions to the perennial shortage of teachers in the hardship areas. Participants such as officials of the teachers' unions, various teachers, the PTA chair, and the district education officials lauded the policy as being appropriate for targeting teachers who would be willing to stay in hardship areas. What participants found problematic, however, was that the policy did not necessarily enhance stakeholder participation in the teacher recruitment process. While, on the one hand, the school principal complained that the Teachers Service Commission had ceded very little discretionary powers to the school boards, teachers, on the other hand, felt that teachers needed more voice on the interviewing panels. All these sentiments point to a desire by the participants to be co-owners of the decentralization project, short of which the policy would end up being, as a participant termed it, "just another government project."

Politicized determination and demarcation of hardship areas.

From the findings of this study, it is evident, too, that the determination and demarcation of hardship areas has not been objective and professional. Issues of power as well as selfish interests on the part of politicians as well as senior government officials have constrained the definition and demarcation of hardship areas. Issues such as the inclusion of well-endowed areas in the list of hardship areas at the insistence of senior government officials, as well as the problematic

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demarcation of hardship areas following political boundaries, highlight the politicized nature of determining and demarcating hardship areas. Such tampering by politicians and senior administrators not only creates administrative problems for school authorities and district education officials, it also casts doubt on the validity of the list of hardship areas as presently constituted.

The apparent confusion in the definition and demarcation of hardship areas is indicative of structural flaws in the government machinery over who has overall mandate over such policy decisions. While the Teachers Service Commission has autonomy over issues relating to teacher management, the Directorate of Personnel Management, Office of the President, has overall jurisdiction on policy issues relating to all public servants. While on paper this distinction may be clear, it is not as clear in operational terms as indicated by the confusion in demarcating hardship areas.

An offshoot of this problematic policy scaffolding is the presence of different hardship allowance rates for teachers and for education officers. The higher hardship allowance enjoyed by the teachers has been a source of complaints by the education officials who, by virtue of their rank, feel that they deserve higher allowances than the teachers do. Such discontent, as explained by the District Education Officer, is the source of administrative hardship.

Overall, the findings of this study support, largely, the theoretical thinking that informed the conceptualization of the study. At the beginning of this dissertation, I theorized that the continued shortage of teachers in remote rural schools was an indictment of a policy framework that privileges elitism –

favouring top-down policy processes that routinely ignore or rubbish the experiences or contribution of grassroots policy stakeholders.

Findings of this study have shown that the policy framework for managing teachers in areas Kenya is still predominantly top-down. Such a framework has a weak conceptualization and understanding of the problems facing teachers at the grassroots level, particularly those in remote rural areas. Efforts to address the disconnect between the top and the grassroots levels of policymaking, notably through the introduction of decentralized teacher recruitment have been ineffectual. This is because such efforts have failed to address the problematic of a mindset that is predisposed to top-down modes of management, thus perpetuating the skewed power relations between the top and bottom rungs of the policy-making ladder. As it is, therefore, despite the rhetoric of decentralization and participative policy processes, the experiences and voices of grassroots policy stakeholders remain marginalized.

Recommendations

Drawing on the findings and conclusions of this study, I make the following recommendations for policy, practice, and research:

Recommendations for policy

First, there is an urgent need for the Teachers Service Commission (TSC) to revisit the conceptualization and definition of hardship with a view to adopting a broad view of the hardships experienced by teachers and schools in remote rural areas in Kenya. This arises from the finding that the official view and definition of hardship was limited in that it did not mirror adequately the experiences and

views of teachers and other grassroots policy players. A broad and inclusive view and definition of hardship is, according to the participants in this study, prerequisite to finding lasting solutions to the problem of teacher shortage in hardship areas in Kenya. More importantly, there is need to revisit the term 'hardship' as it is a misnomer. The more appropriate term would be marginalized areas.

Second, arising from the finding that, at the time of the study, the system for naming and demarcating hardship areas was problematic, I recommend adoption of a more elaborate and objective system of demarcating hardship areas. A possibility, in this regard, would be to go by smaller administrative units such as locations or divisions, or even individual schools, rather than using the district administrative unit, which is very large. Such a system would, furthermore, identify schools that are located within pockets of disadvantage in otherwise well-endowed locations.

Third, there is need for the TSC to rethink the entire compensatory policy philosophy with a view to adopting and strengthening interventions that are more relevant to the hardships and motivations of teachers in hardship areas. This proceeds from the finding that the hardship allowance was largely irrelevant to the problems encountered by the teachers. The literature, too, suggests that financial incentives should only be short-term interventions (Dove, 1982). For a start, though, the TSC could rethink the policy on hardship allowance to make the allowance more attractive and meaningful. As participants in this study suggested, the hardship allowance should be part of the salary, and therefore pensionable

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income for the affected teachers. This would make the allowance attractive as it would have long-term relevance and benefit to the concerned teachers.

The TSC could also consider using promotions as an incentive for teachers in hardship areas. Currently, as noted earlier, the policy on teacher promotion disadvantages teachers in hardship areas as promotions are pegged on the performance of students in national examinations. It would be prudent for the TSC to consider automatic promotion for teachers who serve for a set period, for example 6-8 years, in hardship areas. Similarly, the TSC should also consider implementing a transfer policy that guarantees unconditional transfer to teachers who have worked for a given number of years beyond the mandatory five years in a hardship area.

Fourth, there is need to revisit the policy on decentralized teacher recruitment with a view to devolving more discretionary powers to school Boards of Governors to enable them recruit teachers who are best suited to the circumstances of individual schools in the hardship areas. As participants in this study noted, the guidelines for teacher recruitment gave very little leeway to the school boards thus defeating the overall purpose of decentralized teacher recruitment.

Ultimately, the findings of this study call for a paradigm shift, from the top-down framework to a broad-based participatory process, in the policy framework for addressing the problem of staffing schools in hardship areas in Kenya. This proceeds from the observation that the policy framework for managing teachers in Kenya is still a bureaucratic top-down model that, despite

the introduction of decentralization, still marginalizes the grassroots policy players. Such a framework, more so, is prerequisite to the realization of the stated objective of decentralized teacher recruitment, namely, to broaden stakeholder participation.

I am imagining and advancing a policy framework that draws on, and is rooted in, the idea of participative decision-making as found in African communities. As noted elsewhere in this dissertation, the idea of participatory people-driven decision-making processes, which Teffo calls "communocracy" (2004, p. 446) is an innate element of life in African communities (Abdi, 2008; Diallo, 2006). Traditional African communities made important decisions, whether at the family level, with members sitting by the fireside, or at community level, usually under a tree, through deliberation, thus underscoring the value of dialogue and collective responsibility (Mbiti, 1990).

An important element of decision making in traditional African communities is consensus through deliberation (Menkiti, 2006). Consensual decision making in traditional African communities does not mean that disagreements and tensions are absent. Rather, it entails that each participant "should be persuaded, if not of the optimality of each decision, at least of its practical necessity, all things considered" (Wiredu, 1995, p. 62). Such a position highlights the valuing of all points of view, thus forestalling the tendency to trivialize the right of the minority or the less powerful to contribute to decision making (Ramose, 1999). Within this arrangement, there are no losers or winners as the task is to reconcile conflicting interests. Such pursuit for reconciliation is

rooted in the central role of the community, best expressed in the dictum "I am because we are; and since we are, therefore I am" (Mbiti, 1990, p. 106).

The policy framework I propose would have the school at its centre. The choice of the school as the centre is both symbolic and logical. Historically, the colonialists used education, thus schools, to disrupt the cohesiveness that marked traditional African society (Bogonko, 1992). Refocusing on the school is therefore a symbolic return to the point of departure, a move to rekindle "communal renewal and self-confidence" (Thiong'o, 2009). At another level, the school is a key organizing point in community life particularly in rural communities in Kenya. Normally situated at the centre of the village, the school serves as a venue for various community activities including weddings, funerals, and political meetings. With the school at the centre of the new policy framework, the policy community will thus have a strong representation of stakeholders with immediate connections to the schools such as teachers, parents, and community members. Moreover, having the school at the centre of policy making would galvanize key local resources including clan structures, school communities, religious organizations, as well as women and youth self-help groups.

For administrative logistics, such a framework calls for an expanded role for school Boards of Governors. This would necessitate rethinking on the constitution of such boards in line with the sentiments expressed by participants in this study. Necessarily, such boards would be elected and representative of the various social groups in the community, with provisions for co-opting members with particular skills and competencies. Currently, the minister for education, on

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advice from the school principal, appoints school boards. More importantly, the board would play an overarching oversight role, with provisions for constituting specialized task groups for specific assignments. In terms of government oversight, I think the district education office would be ideal. This is because the district, as an administrative unit, is aptly situated midway between the grassroots and the national administrative levels, thus constituting a natural meeting point for the two levels of policymaking. Moreover, the district education office is suitably positioned to facilitate connections between the school boards and some of the key structures and networks such as the District Education Board, Constituency Development Committees, as well as various civil society and community networks.

The participatory framework I envisage would engage the following key processes: (a) identification of relevant stakeholders, (b) identification of areas of consensus or dissent, (c) identification of common objectives and perspectives, (d) definition of responsibilities for each stakeholder, (d) capacity building, and (e) information sharing. These processes are not in a chronological order nor are they a 'cook book recipe', but broad suggestions that define an attempt to engender a grassroots centred policy framework.

Necessarily, an initial step towards a more inclusive policy framework would be to constitute a broad-based participant base. As noted in the findings, many of the participants called for inclusive policy-making, indeed each category of participants gave reasons to justify their claim for inclusion in the policy processes for managing teachers in hardship areas. Relevant stakeholders would

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include, among others, school Boards of Governors, Parents Teachers Associations, school administrators, individual teachers, relevant non-governmental and civil society organizations, researchers, individual community members, and education officials. Such a consultative and inclusive policy machinery would, in my opinion, garner more credibility and legitimacy than the government appointed task forces dominated by Nairobi-based civil servants.

Another key process would be deliberation with an aim to tease out areas of agreement or disagreement by the various policy stakeholders. Naturally, each of the participants brings to the policy table interests often in conflict with those of other stakeholders. For instance, my study showed that the decentralized teacher recruitment policy was failing, in part, due to conflicting interests at the District Education Board, where, as the District Education Officer put it, the members were "not pulling in the same direction." However, the ideal of such consensus, drawing on traditional African thinking, is not conformity (Munamato, 2010) or identity of thought (Wiredu, 1996). Rather, as Bachrach and Botwinick (1992) posit, the aim is to afford each of the participants an opportunity to discover and articulate their real interests and to further the democratic ideal of equality. Following this step would be the need to define clearly the responsibilities for each of the stakeholders. Whereas I envisage a loosely structured process that foregrounds deliberation rather than formality, it would be necessary to have clearly spelt ground rules, reporting channels and accountability procedures.

For the process of participatory policy-making to be effective, there is need to ensure that the various stakeholders have the prerequisite competence and expertise (Hemmati, 2002), particularly with regard to policy knowledge. Here I am indulging an expansive understanding of policy knowledge that spans "official knowledge constructed from national survey-based statistics, through...narratives woven and promoted by various actors, to popular knowledge based on people's own experiences" (McGee, 2004, p. 11).

As this study showed, participants had reservations about the competence of members of school Boards of Governors to interview prospective teachers. Whereas such a shortcoming may inhibit the efficiency of the boards, the reservations expressed by the teachers, and even by the principal, betray a narrow conceptualization of policy knowledge and participation, where expertise and competence are limited to literacy and formal managerial qualifications. The issue of interviewing teachers could be addressed, as suggested above, through constituting interview panels that are professional-heavy. Within the expanded view of policy knowledge defined by McGee (2004), those less literate and "incompetent" members of the school boards have experiences and knowledges that are valuable, and as such have a role to play in the boards. Nevertheless, the move to decentralize teacher management, and education management in the long run, thus broadening stakeholder participation, naturally calls for the relevant policy players to have some working knowledge of basic managerial skills. This is why I suggest the need for training across the board on key policy-related

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competencies such as public policy procedures, financial management, interviewing skills, and people management skills.

Finally, and closely tied to the issue of capacity building, my proposed participatory policy framework should have an inbuilt information sharing system that is both transparent and accessible since, as Hemmati points out, equitable access to information and capacity building would "ensure competence on all sides" (2002, p. 62). Moreover, participatory democracy presupposes access to information so that all the relevant stakeholders can contribute meaningfully in policy processes.

As experience has shown, corrupt and dictatorial regimes in Africa have routinely curtailed citizen access to information through censorship of press, manipulation of information, and restricting freedom of expression and association (Chibambo, 2006). In Kenya, the successive post-independence quasi-democratic governments have starved the citizens of information by throwing a veil of secrecy over all manner of information, even when such information is already in the public domain. As Kamar (2006) rightly observes, the layered classification of government documents into top secret, secret, confidential, and public, coupled with lack of a comprehensive national information policy, have "created legalistic obstruction to the flow of information to the general public" (p. 7).
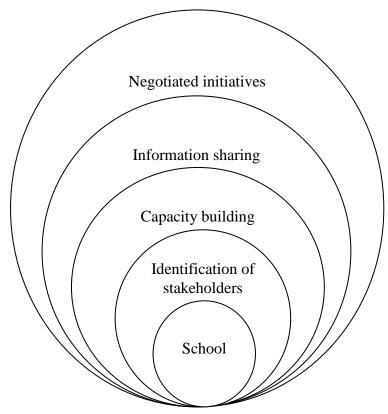
Findings from this study have shown that the policy framework for managing teachers in Kenya, imbued with concerns for rank and bureaucracy, does not allow for the free flow of information prerequisite to inclusive

deliberation. Within my proposed framework, information sharing is vital, especially on the part of government, in order for the rest of the grassroots stakeholders to make informed choices and decisions. Even where truly confidential information is concerned, the willingness to share information by all the stakeholders will enhance trust and a sense of ownership amongst the participating groups. In traditional African communities, as pointed out earlier, it is natural and routine to share information since knowledge is produced and owned communally (Hamminga, 2005).

Addressing the problem of teacher shortage, among other equally demanding policy concerns for schools in hardship areas, within such a participatory framework would, I hope, lead to shared and broad understandings of rural problems and potentials, particularly as they relate to the work of teachers. Such an understanding is prerequisite to finding workable solutions to the myriad problems facing remote rural schools, and particularly the problem of teacher shortage.

Ultimately, the call for an inclusive broad-based policy framework is an attempt to reclaim the centrality of the community at as the centre of decision-making. Foregrounding the school as the rallying point for such a quest is an effort to claim the school, a tool for the colonial divide-and-rule ideology, as a space for the community's quest for self-determination. This is a paradigm shift. The shift, I contend, is not in the attempt for a bottom-up approach, but in the overall reframing (Smith, 2002) of the parameters for naming the bottom, the top, the centre, and the margins. Within this reframing, the grassroots policy

stakeholders are no longer in the margins but at the centre of policymaking. The return of grassroots policy stakeholders to the core of policymaking processes is, for me, the ideal of decentralization. It is, in fact, recentralization of policymaking. Below, figure 6.1, is a diagrammatic representation of my proposed participative policy framework.

Figure 6.1. *A conceptual model for an inclusive policy framework for staffing remote rural schools*

The oval shape is symbolic of the circular seating format that characterizes dialogue in traditional African communities, whether around a tree, or around a fire. As I was contemplating how to represent the process diagrammatically, I recalled my childhood passion of throwing pebbles into water ponds to create ripples. The ripple effect, represented by the concentric circles, conveys the ideas of simultaneity, wholeness and interaction. The net effect is a policy process that foregrounds dialogue, participation, and equality and whose epicentre is the school. This is antithetical to the hierarchical, top-down process that currently defines the policy making process.

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Recommendations for practice

Individual schools could help in attracting and retaining teachers in hardship areas. As suggested by various participants, schools in hardship areas should prioritize the welfare of their teachers especially with regard to housing. Moreover, the cost of putting up houses in such areas is relatively cheap owing to the low cost of materials such as sand, gravel, and bricks. Labour, too, is cheap and, furthermore, schools in hardship areas encourage parents to contribute their labour in lieu of cash towards the payment of fees for their children.

School administrators, particularly school principles, should endeavour to put in place practices that make all the teachers, particularly those from different ethnic communities, to feel welcome and comfortable in the school. Such practices would address unfortunate situations like the case where teachers spoke in the local vernacular in the staffroom, and even in staff meetings, in the presence of Mr. Njuguna who did not speak the language. It defeats any grand policy efforts to attract and retain teachers in hardship areas if teachers find the social climate in the host schools hostile, as no amount of money or incentive can replace hospitality.

Teacher preparation programs, too, could help by providing their students training and experiences that address some of the challenges of teaching in remote rural schools. This derives from concerns raised by several teachers in my study that their teacher education did not prepare them to teach in poorly provisioned schools. A beginning point would be for such programs to adopt a critical perspective to prepare the students to be more engaged in the analysis and

solution of challenges in their career paths. Appreciably, most teacher preparation programs prepare "beginning" teachers as teaching is such a complex activity that no program can ever expect to fully prepare its graduates. As such, it takes many years of experience and professional development to develop the expertise that is required to be a very confident and knowledgeable teacher who is able to address the multiplicity of issues facing him or her and his or her students. Nonetheless, I think university departments of education have a responsibility to prepare their students, albeit nominally, for the challenges of teaching in poorly equipped and staffed schools..

The teaching practice program, lasting a whole school term (approximately three months), is an excellent opportunity to give the students hands-on experience on working conditions in hardship areas. However, owing to logistical and financial constraints, the universities normally avoid schools in hardship areas, preferring instead more accessible schools in urban and suburban areas for their students' teaching practicum placements. It is, nevertheless, possible to rethink the modalities of teaching practice and to adopt strategies that override some of the cost and logistical challenges for the university departments of education. Such strategies would include, for example, involving experienced teachers in the hardship areas to supervise the students on teaching practice instead of solely relying on the professors for such supervision.

Recommendations for research

The findings of this study point to the need for research on two fronts: (a) broad understandings of hardship, and (b) teacher preparation. First, there is need

for further research to establish an expansive view of hardship. Findings of this study have shown that, at the time of the study, the official definition of hardship framed a narrow conceptualization of hardship that did not take into consideration the views and experiences of teachers and other grassroots policy stakeholders. In this study, I attempted to bring on board more stakeholder, especially grassroots, views and experiences of hardship. This, however, is not adequate. As suggested by some of the participants, there is need for research that would tap into the expertise of other professionals such as surveyors, economists, agriculturalists, and civic society organizations in order to frame a broad conceptualization and definition of hardship. Such an undertaking, moreover, fits well with the overarching rationale of my proposed broad-based policy framework (fig. 6.1 above) for addressing teacher shortage in hardship areas.

In addition, I think there is need for research to document the experiences of teachers working in other contexts of hardship such as those in areas affected by ethnic hostilities, or those in mobile schools in areas occupied by nomadic pastoralist communities. Schools in areas occupied by nomadic pastoralists, for example, operate odd hours – early morning and late evening – to give the students time to graze their family cattle and to search for water, alongside attending school. Teachers in such contexts experience unique hardships that would illuminate a holistic understanding of hardships in remote rural areas. Such a comprehensive understanding would help, besides informing policy on attracting and retaining teachers, to design and implement context specific

pedagogical and other policy interventions to ameliorate the lives of teachers in such hardship areas.

Second, there is need for research that interrogates the preparedness of teachers to work in hardship areas. Several teachers alluded to the fact that their teacher education did not adequately prepare them to work in poorly equipped schools. Even though developing competence in teaching, as pointed out earlier, can hardly take place during training, it nevertheless remains the responsibility of teacher preparation programs to equip their students with entry-level skills and competencies that would allow them to appreciate and take in stride the challenges of teaching in hardship areas. It would be interesting, in this regard, to study whether teacher education programs in universities and in other teacher training institutions in Kenya predispose their students to teach in well-equipped urban and semi-urban schools as opposed to poor schools in remote rural areas.

Chapter 7

Personal Reflections

This study is now over or is it? As I sit to write this last chapter, I am listening to my village hero, Peter Muambi, and his Kyanganga Boys' Band, playing their hit song *Telesia*. The song is about a romantic escapade gone awry! Peter offers to take his newlywed wife, Telesia, on a tour of the Kenya coast. However, tragedy strikes midway through the journey when at the scenic Chyulu hills, near the Tsavo national park, Telesia falls in love, and takes off, with a truck driver, leaving behind a forlorn Peter to reflect on where he might have gone wrong and what the future holds for him.

This chapter entails personal reflections related to various aspects of this study that I consider a relevant addition to the "formal" discussions presented in the dissertation. In the first part, I examine, in hindsight, the decisions and hesitations that informed the conceptualization of this study. More importantly, I interrogate my overall sense of satisfaction with the study, particularly the decision to adopt a qualitative design foregrounding a conversational approach to the collection of data. In the second part of the reflections, I expand on some of the ideas in the dissertation, particularly from a personal experience perspective, and suggest further research and policy possibilities.

Fortunately, unlike Peter Muambi, my reflections proceed from a sense of satisfaction and initial accomplishment. I am happy that the study has afforded me an opportunity to engage with an issue that is not only an important policy concern, but also one that is of deep personal interest for me. Nevertheless,

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Peter's plea to his wayward wife, Telesia, *"kyalo kii ni kinene na tuendete kuasa"* [this is a long journey and we still have a long way to go] which is also the song's chorus, resonates with my thinking about this study as being a small component of a larger program of research, an initial step in a long journey.

My initial idea was to conduct a comparative study of teachers' lives in remote rural areas in Kenya and Canada. However, I quickly realized that such a study required more time and resources than I had. That idea is still relevant and alive and this study is an important stepping-stone towards that goal.

I had originally thought of locating my study in Ikanga secondary school, my first posting as a teacher, where this entire story began. My thinking was that it would have been relatively easy for me to set up interviews given my familiarity with the teachers and the locality. Moreover, I have a clear idea of the hardships faced by teachers in that part of the country and so I thought it would be easy for me to engage with the experiences of the teachers and other participants. However, upon deeper reflection, and wide consultations, I realized that working in an environment that one is too close to could be a hindrance in that one could easily gloss over certain issues because of their familiarity. Moreover, the participants, knowing that I had similar experiences, could easily avoid narrating certain key details on the assumption that I already knew such details. Indeed, in the course of this study, I had problems setting up the initial interview appointment with one of the teachers at Kalamboni secondary school who is a close friend. The participant postponed our first two appointments on what I thought were flimsy excuses, each time telling me that we still had plenty of time.

We eventually worked out a schedule that we stuck to, but the experience made me grateful that I had decided on a study site where I was not familiar with the majority of the participants.

Given that the object of this study was to contribute to the policy knowledge base, thus enriching policy conversations particularly with regard to staffing schools in hardship areas in Kenya, one may wonder whether a survey would not have been a more appropriate tool for harnessing policy relevant data. Indeed a senior officer at the Ministry of Education in Nairobi, when I went to get my research permit, was perplexed that I was proposing, in his words, "a qualitative study to address the problem of teacher shortage." Nonetheless, he was keen to read my final report. The experience of carrying out this study has been fulfilling in many ways. With regard to policy, findings of the study have shown that the grassroots stakeholders have very valuable experiences and understandings of rural hardships that could inform better policy on the recruitment, motivation, and retention of teachers in hardship areas.

Listening to the stories of the teachers gave life and meaning to issues that appear as mere words on policy documents. Even for me, with considerably long experience working in hardship areas, the stories revealed new and interesting dimensions of hardship. Mrs. Jimmy's account of how living away from her husband interrupted the power relations in her marriage, thus risking the stability of their marriage, was particularly revealing, as was Mr. Kisau's contention that the poor quality of students was his biggest hardship. Overall, such qualitative

data, as Smit (2003) argues, offer deep nuanced understandings of the complexities of policy design and implementation.

Moreover, the conversational approach enabled me to realize that grassroots policy stakeholders are not passive observers of policy processes. They have valuable opinions and interpretations of policy that are relevant to the policy formulation process. This echoes the assertion by Bowe, Ball, and Gold (1992) that "practitioners do not confront policy texts as naive readers; they come from histories, with experience, with values and purposes of their own, they have vested interests in the meaning of policy" (p. 22). This reality was alive in my numerous conversations with teachers in the dilapidated staffroom, or under the shade of the mango trees at Kalamboni secondary school, as well as in the offices of the teachers' unions and education officials in Makueni district.

With regard to future research directions, I think a study that brings together the different policy stakeholders concerned with teachers in hardship areas would be a great idea. While the introduction of decentralized teacher recruitment is an important initial step towards opening up participatory policymaking, the findings of this study have shown that the initiative is constrained by the overarching bureaucratic machinery that favours centralism. I am thus thinking of a study employing a deliberative dialogue methodology. Such a study would bring together officials from the Ministry of Education, Teachers Service Commission, Directorate of Personnel Management, as well as district level officials, teachers' union officials, school administrators, teachers, civil society groups, and members of the community to deliberate on ways to deal with

teacher shortage in remote rural schools. In my opinion, based on my experience in a recent research project employing a deliberative dialogue methodology, such a study would contribute to opening up spaces for truly participative policy processes.

To this end, moreover, I am thinking of a study that engages more broadly with the issues of access to quality education, and participation in the attendant policy processes, as citizenship rights. The perennial shortage of teachers in schools in hardship areas, among other problems, which compromises the chances of students in such areas to access quality education, and the non-participation of local policy stakeholders in the policy processes to address the problems of education in their area, limit the local people's enjoyment and expression of their citizenship. Linking this idea to citizenship is timely since, as Mbaku and Ihonvbere (2003) observe,

> Today the reconstruction of the African state to provide citizens with participatory, accountable and transparent government structures remains one of the most important issues in the continent's political adjustment in the new global era. ...to improve the continents ability to participate effectively the new global order...political spaces must be opened to allow for more participatory and democratic forms of governance. (p. 30)

With regard to motivating teachers, I think there are many possibilities for school boards in hardship areas to exercise their agency without recourse to overarching policy shifts. A simple gesture such as a meeting between the board and teachers over a roast goat lunch or dinner could be a huge motivator. In my

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conversations with various teachers at Kalamboni, I got the sense that the school board hardly met the teachers and that, indeed, the teachers did not even know who the members of the board were. Thus, even as I fault the top-down management of education in Kenya generally, such structures are reproduced within individual schools, leaving the teachers feeling doubly marginalized.

Furthermore, I think it is feasible to source support and funding for teacher incentive programs from outside of the government. Rather than depend on central government sources, which are limited, to finance incentive packages for teachers in rural areas, it would be prudent to explore other sources within the broader government-wide decentralization program. Sources that quickly come to mind include, for example, the Constituency Development Fund (CDF) and Local Authority Transfer Fund (LATIF), under the control of constituency development committees and local councils respectively. It would only take a bit of imagination and initiative for school boards to access such funds. Such a move to include other central government, local government, and even private sector participants in seeking for solutions to the hardships faced by teachers is logical, moreover, since many of those hardships – shortage of water and food, poor transport and communication, harsh weather – are outside the control of the Ministry of Education anyway.

Ultimately, I strongly think the government will have to reassess the usefulness of school Boards of Governors. Critics of school boards argue that such boards are relics of the all-powerful, single-party, governments of the pre-1997 period that were preoccupied with total control over every aspect of public

life. Suggestions have been made of the need to replace the boards with elected Parents Teachers Associations (PTAs). The government has since moved to assuage such discontent by including two PTA representatives in school boards. In my experience, such a move has done little to placate those who think that the government-appointed boards are just another layer of government control, and an unnecessary bureaucracy in a decentralized educational management setting. Furthermore, there is also the legitimate claim that such boards are a financial and logistical burden to poor schools in the hardship areas as such schools can hardly afford the costs of holding board meetings. In fact, part of the reason why urban-based people are reluctant to be on the boards of schools such as Kalamboni is that such schools cannot afford to reimburse their travel expenses.

At the end of my stay at Kalamboni secondary school, and to my utter surprise, the principal and the teachers invited me as a special guest to their end of term dinner. Over platefuls of excellently roasted goat ribs, with fresh vegetables and *ugali* (a delicacy made from corn flour), the principal and the teachers thanked me for providing an opportunity for them to engage with an issue that was close to their hearts, both professionally and personally, and more importantly, for providing a forum for them to tell their stories. The invitation, as well as their sentiments, surprised me because I felt that, indeed, I was the one who owed them a treat and gratitude for sparing so much of their time to share their stories.

The burden of retelling those stories weighed heavily on my shoulders as I drove away from Kalamboni secondary school for the last time on that cool

Thursday evening. As I rounded the last bend to join the main road, the thick cloud of trailing dust obscuring my attempt to catch a last glimpse of the school, I caught myself humming Peter Muambi's parting words to Telesia, *"kyalo kii ni kinene na tuendete kuasa!"* Beyond the small hill, past the two baobab trees, the sun was setting.

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Appendices

Appendix A

Letter of request to participate in the study

P.O. Box 389

<u>Masii</u>

The Principal

Kalamboni Secondary School

Private Bag

<u>Makueni</u>

June 1, 2008.

Dear Sir,

<u>**RE: RESEARCH**</u>

My name is Joseph Nungu (PhD student in Theoretical, Cultural, and International

Studies) in the Department of Educational Policy Studies at the University of Alberta,

Canada. The purpose of this letter is to invite your office to participate in a research

study entitled *Policy From Below: Foregrounding Teacher Experiences of Hardship in

Remote Rural Secondary Schools in Kenya*. The purpose of the study is to investigate

the experiences of teachers serving in rural secondary schools in hardship areas. The

study will also examine the measures that have been put in place to attract and retain

teachers in such schools. In this regard, the study will seek the opinions of various

stakeholders regarding these measures and the working conditions of teachers in

schools in hardship areas. It is my hope that the findings from this study will inform

policy makers and educators about possible alternative policy formulation frameworks

that may help to find a lasting solution to the problem of teacher shortage in schools in hardship areas. This study will take place over three months and is funded by the Canadian Commonwealth Scholarship Program. Data from this study will form the basis of my PhD in Education thesis.

With your permission, I would like to carry out this study in your school. Attached to this letter is a consent form. This consent form, a copy of which will be left with you for your records and reference, is only part of the process of informed consent. It should give you the basic idea of what the research is about and what your participation will involve. If you would like more details about something mentioned here, or information not included here, please contact me. Please take time to read this carefully and to understand any accompanying information.

During this study, informed and written consent will be obtained from all participants before interviews begin. The interviews I will conduct with you (lasting approximately 60 minutes) will be done at the school. I am requesting you to facilitate for a meeting with the teachers where volunteers for a focus group discussion will be selected. The focus group discussion(s) will be held at the school (lasting approximately 60 minutes). From the focus group discussions, 5-7 teachers will be invited to volunteer for personal interviews (lasting approximately 60 minutes every two weeks for one school term (approximately 3 months). I will be asking participants for permission to audio-record and take notes during the focus group and individual interviews. In all cases, my interpretations of the emerging themes from the interviews will be shared for confirmation by the participants who provided me with the data. In other words, you will asked to read through brief summaries of my understandings and

make additions and deletions to these before the information is analysed and synthesized in preparation for my thesis. The interview schedules have been appended to this letter as information.

Given the nature of the study, I do not anticipate there will be any risk to the participants. Before providing written consent, however, the participants will be told of their right to withdraw from this study at any time without penalty. I will repeat this before each focus group and personal interview begins. At that time, all the participants will also be informed that every effort will be made to provide anonymity and confidentiality with pseudonyms and the deletion of any identifying information although anonymity and confidentiality cannot be guaranteed. Participants in the focus group interviews will be reminded that what is stated during the interviews should not be repeated outside the focus group. They will also be informed that to maintain confidentiality, when the final thesis, manuscripts for scholarly journals, and other conference presentation materials are disseminated, I will not use quotes that might specifically identify individuals. While conducting the study, all notes and audio recordings will be kept secured in a password-protected computer in my locked premises. Only I will have access. All notes, audio-recorded interviews, and any transcriptions will be destroyed after 5 years. I anticipate completing this study and my thesis no later than August 30th, 2010.

Participants will be provided with feedback on the progress of the research once every month over the duration of the study. They will also be informed at the outset, that they can request and receive a copy of the thesis sometime after August 2010. Prior to writing my thesis, I will provide my interpretations of interview data to participants,

from whom the data were gathered, for confirmation. At this point, the participants will be reminded that they can withdraw their consent. After this point, withdrawal will not be possible since their narratives will be integrated into a story and will therefore be hard to withdraw. Upon completing the final thesis, I will send a summary report to you to share within the school. The results of this research will also be used for publication and presentation to scholarly groups and policy makers.

If you are willing to accept this invitation and would like your school to participate in the study, I would ask that you please read and sign the attached Consent Form and return it to me.

Should you have any questions or require further information, please do not hesitate to contact me at: Joseph Nungu (Tel. 254—734 135496; e-mail: nungu@ualberta.ca). If you have any concerns you would like to express directly to my research supervisor at the University of Alberta, Dr. José da Costa, he can be reached at jose.da.costa@ualberta.ca, or by telephone at 780-492-5868. The plan for this study has been reviewed for its adherence to ethical guidelines and approved by the Faculties of Education, Extension and Augustana Research Ethics Board (EEA REB) at the University of Alberta. For questions regarding participant rights and ethical conduct of research, contact the Chair of the EEA REB at (780) 492-3751.

Sincerely,

Joseph Musembi Nungu

Appendix B.

Written Consent Form

Your signature on this form indicates that you have understood to your satisfaction the information regarding participation of your district/school/branch in the *Policy From Below: Foregrounding Teacher Experiences of Hardship in Remote Rural Secondary Schools in Kenya* research project and agree. In no way does this waive your legal rights nor release the researchers, sponsors, or involved institutions from their legal and professional responsibilities. You are free to withdraw from the study at any time, and/or refrain from answering any questions you prefer to omit, without prejudice or consequence. Your continued participation should be as informed as your initial consent, so you should feel free to ask for clarification or new information throughout your participation.

Principal Researcher: Joseph Nungu (Tel. 254-734-135496; e-mail:

nungu@ualberta.ca)

If you have any concerns you would like to express directly to my research supervisor at the University of Alberta, Dr. José da Costa, he can be reached at

jose.da.costa@ualberta.ca, or by telephone at 780-492-5868.

The plan for this study has been reviewed for its adherence to ethical guidelines and approved by the Faculties of Education, Extension and Augustana Research Ethics Board (EEA REB) at the University of Alberta. For questions regarding participant rights and ethical conduct of research, contact the Chair of the EEA REB at (780) 492-3751. A copy of this consent form will be given to you to keep for your records and reference.

School District Name: _____

Printed Name and Position of Authorizing Officer giving written consent:

_____Date: _____

Signature of Authorizing Officer giving written consent:_____

Work Telephone Number: _____

E-mail: _____

_____**No**, I choose not to participate in the *Policy From Below: Foregrounding*

Teacher Experiences of Hardship in Remote Rural Secondary Schools in Kenya

research study.

_____**Yes**, I agree to participate in the *Policy From Below: Foregrounding*

Teacher Experiences of Hardship in Remote Rural Secondary Schools in Kenya

research study.

I agree:

- I will be interviewed once for a maximum of 60 minutes

- I will be asked to review a copy of the transcript for verification

- I can withdraw my consent at any time in the process**.** However**,** after

  verifying the transcript, I will no longer be able to withdraw since the data

  will be integrated into a story.

Participant's Signature _____**Date:** _____

Appendix C

Selection score guide for secondary school teachers (Adapted from TSC 2006)

CANDIDATE'S NAME _____ **GRADE** _____

SCORING AREAS	MAXIMU MSCORE	ACTUAL SCORE	Mean score
(a) Academic and Professional certificates			
Degree (BED) (i) First Class/Masters	20		
(ii) Second Class Upper	15		
(iii) Second Class Lower	10		
(iv) Pass	5		
OR			
Diploma (i) Distinction	15		
(ii) Credit	10		
(iii) Pass	5		
SUB TOTAL	**20**		
(b) Length of stay since qualifying as a teacher			
(i) 7 years and above	50		
(ii) 6 years	40		
(iii) 5 years	30		
(iv) 4 years	20		
(v) 3 years	10		
(vi) 2 years	5		
(vii) 1 year	0		
SUB TOTAL	**50**		
(c) Length of teaching in current station under BOG:-			
5 years and above	25		
4 years	20		
3 years	15		
2 years	10		
1 year	5		
SUB TOTAL	**25**		
(d) Communication ability, special talent and willingness to participate in co-curricular activities and other duties assigned by the head	5		
SUB TOTAL	**5**		

Appendix D

Interview Guides

i) Interview items for teachers

1. Personal details (home/family life)

2. Teaching history (general)

3. History at current school (when reported, why choice of the school, responsibilities)

4. What was the most striking thing for you when you first arrived here? What were your initial impressions of the school?

5. Understanding of hardship

6. Thoughts on of the TSC classification of hardship areas

7. Personal experiences of hardship (inside & outside of school)

8. Story about an incident relating to a particular hardship

9. Views on the hardship allowance

10. Experience/opinion regarding decentralized teacher recruitment

11. How do you spend your time after work and over the weekends?

12. Aspects you like/don't like in the school/community

13. Ever considered/applied for transfer?

14. Suggestions for ways to motivate teachers in hardship areas

ii) Interview items for school administrators

1. History of the school

2. The staffing situation in the school

3. Experiences of hardship relating to administration of the school

4. Concerns/problems of the teachers

5. Measures by school administration to make teachers more comfortable

5. Experience/views on decentralized teacher recruitment

6. Suggestions for attracting and motivating teachers in hardship areas

iii) Interview items for teachers' union officials

1. Understanding of concept of hardship for teachers

2. Concerns received from teachers

3. Thoughts on the TSC classification of hardship areas

4. Views on the hardship allowance

5. Experience with decentralized recruitment of teachers

6. Relationship with school BOGs and school principals

7. Relationship with DEO's office/the other teacher's union

8. Suggestions for TSC/school authorities to motivate teachers in hardship areas

iv) Interview items for district education officials

1. The staffing situation in the district (for secondary schools especially)

2**.** Government definition of hardship/hardship areas

3. Concerns/problems of teachers in the district relating to hardship

4. Challenges of being senior administrator in a hardship district

5. Experience with the current demarcation of hardship areas

6. Views on the hardship allowance

7. Experience with decentralized teacher recruitment

8. Relationship with the teachers' unions

9. Suggestions for attracting and retaining teachers in the district