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Editorial note:

Faculty of Humanities Teaching and Learning Colloquium 2025 (T&L Colloquium 25) hosted by the Faculty of Humanities, North-West University, South Africa took place in Rustenburg, South Africa, from September 9-11, 2025, with a rich and stimulating programme filled with inspiring keynotes, contributed papers, workshops and panels. This bi-annual colloquium brings together educators, researchers, students, policymakers, and community practitioners. The main theme of T&L Colloquium 25 was “Reimagining the Future of Humanities Knowledge and Pedagogy: Decoloniality, Technology and the Social Justice Imperative.” This special issue of the *Journal of Contemporary Society And Education (JCSE)* contains Thirteen (13) selected papers presented at T&L Colloquium 2025. Selected contributions come from within and outside of South Africa and address a wide range of issues in humanities, decoloniality, technology and the social justice.

The introductory contribution by Tshifhiwa Ignatia Mashau provides an overview of research findings and trends related to the colloquium’s focus on the role of digital humanities and technology in supporting decolonial scholarship. The author’s article which titled “Decolonising digital health promotion in African higher education institutions: A justice-oriented literature review” develops a Digital Health Justice Framework to guide equitable and culturally responsive digital health promotion in African HEIs. A research article by Eyitayo Francis Adanlawo and Mpho Chaka follows with a discussion of emerging career pathways that foreground wellbeing and sustainable development, positioning humanities graduates as key contributors to sustainable and ethical futures. The authors identify novel professional opportunities in sectors including community engagement, policy development, and social innovation. They advocate for an expanded employability paradigm that integrates humanistic knowledge with sustainable development goals, underscoring the vital role of humanities disciplines in shaping resilient, inclusive societies.

The article by Nurain Aboo Mohammed evaluating the use of QR codes as a form of assessment in teaching and learning. The author confirms the potential of QR codes as both a useful and effective medium for assessment in educational settings. Samuel Chukwudi Agunyai and Victor Ojakorotu article “Analyzing the effect of the disconnection between the curriculum and Africa’s indigenous Knowledge on effective learning” argues that Africans’ realities still encompass indigenous knowledge on various levels that can be incorporated into the continent’s school curricula.

Other articles include: Examining the Impact of Digitalization and Inequality Post Covid -19 In Africa by Phuti Ignatius Moloto and Rosinah Pillay; The Omitted Conversation: Incorporating Teacher Union Scholarship for A Transformative Educational Agenda Within the Educational Landscape. Thembinkosi Zwane Trevor, David Matsepe; Examining factors behind an achieving institution: A scenario of secondary schools in Limpopo Province by Ngwako Solomon Modiba; Assessing the role of the COVID-19 catch-up recovery programme on learner performance in EFAL by Vele RJ, Tshikota and TM Badugela; Entrepreneurial Education and Sustainable Entrepreneurship Advancing Sustainable Development Goals in South Africa Through Small Businesses by Lazarus, M. and Beharry-Ramraj,

A; Mitigating Grammatical Ambiguity In English Prepositional Phrases At Dzindi Circuit Secondary School, South Africa by Farisani Thomas Nephawe; Exploring the Usage of Metadiscourse in Research Proposals Written by Honours Students by Mzamani Steven Khosa and Ernest Kwesi Klu; and Population Ethics and its implication for Developing Countries by Onwe Peter S. and Kelechi Johnmary Ani. Policy Windows and Missed Opportunities: An Institutional Analysis of How Teacher Unions Influence (or fail to influence) National Educational Policy Formulation by Zwane Thembinkosi Trevor, Matsepe David.

Editor,

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13. Policy Windows and Missed Opportunities: An Institutional Analysis of How Teacher Unions Influence (or fail to influence) National Educational Policy Formulation

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POLICY WINDOWS AND MISSED OPPORTUNITIES: RETHINKING TEACHER UNION AGENCY IN POST-COVID SCHOOL LEADERSHIP AND GOVERNANCE REFORM

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Abstract

Teacher unions hold a vital and debated role in the governance and professional management of schools in South Africa. Public discourse often characterizes unions as either obstructive or protective labor entities; however, there is a scarcity of empirical research regarding their institutional roles within school leadership frameworks, especially in the context of post-COVID-19 reforms. This study analyses the role of teacher unions as institutional stakeholders in school governance, their strategic positioning during reform and crisis, and their mediation between policy frameworks and pedagogical practice. The study employed a qualitative interpretive design, informed by an institutional perspective on organizational legitimacy and temporal alignment. Semi-structured interviews were carried out with twelve participants, including four principals, four members of the School Management Team (SMT), and four union representatives. The data underwent thematic analysis in conjunction with pertinent policy documents. Research indicates that teacher unions operate via formal mechanisms, including collective bargaining and statutory participation, while also exerting normative influence through professional development initiatives and representational advocacy. Their impact is influenced by institutional tensions, strategic misalignment, and temporal constraints, particularly during the post-COVID reform period. While unions play a role in stabilizing policy and ensuring professional coherence, their involvement tends to be reactive, leading to lost opportunities for ongoing reform. The research indicates that teacher unions both facilitate and limit educational transformation, highlighting the necessity for improved coordination, strategic planning, and collaborative governance to optimize their positive impact on school leadership and professional management.

Keywords: *Teacher unions; School governance; Institutional influence; Professional management; Policy implementation; Post-COVID reform; South Africa.*

1. Introduction and background to the study

Recent educational policy formulation is primarily characterized by rational consultation, evidence-based research, and

inclusive participation. However, such representation masks the more complex institutional dynamics, power, strategic framing, and timing that determine whose voices are heard and whose interests are sidelined (Adams, 2016; Rinquist &

Simba, 2024). The framework of the policy window, as explained by Kingdon (1995), provides an analytical basis for understanding the moments when streams of policies, problems, and politics converge, thereby enabling or foreclosing reform (Perks & Gilchrist, 2022).

Recently, there has been ongoing empirical attention to how teacher unions both enable and inhibit national policy change. The study conducted by Kimati and Rusznyak (2018) on the advancement of professional teaching in South Africa examines the impact of various regulatory frameworks, including the integrated quality management system (IQMS), the South African teachers' code of ethics, and the role of teachers in shaping and influencing professionalism. This framework primarily addresses professional standards but neglects ethical judgment and the relational dimensions of teaching practices (Kruger, 2019). This suggests that even when teacher unions engage with policy, the content of regulations reflects institutional choices that have the potential to limit transformative outcomes.

An article by Msila (2022) on teacher unions, schools, and success indicates that the presence of teacher unions is significant at the school level, particularly when school leadership aligns with union affiliation. This alignment can enhance learner achievement and the management of diversity, even in historically marginalized contexts. However, the same study indicates that teacher unions exhibit limited effectiveness in translating their influence into national policy design; their impact is more pronounced in local or school-based contexts (Msila, 2022). Teacher unions are constitutionally positioned to influence policy; however,

their actual influence is mediated by various factors, including institutional culture, bureaucratic inertia, political alliances, and the (mis)alignment between union-framed issues and the prevailing state policy agenda (Finger, 2019). This paper situates its inquiry within higher education, focusing on the unique implications of national policy formulation for the training of teacher unions, curriculum design, and the teaching of assessment and pedagogical practices in universities and teacher education institutions.

The National Policy Framework for teacher education and development in South aims to ensure coherence from initial teacher preparation to continuing professional development (Xaso et al., 2017). This framework requires university-based teacher educators, curriculum developers, implementers, and personnel in higher education teaching and learning centres to engage with and respond to national policy. Higher education institutions, particularly those with teacher education departments, often function as intermediaries where state policies, union interests, practices, and pedagogical interests converge (Aydarova et al., 2022). Political decisions made at the national level regarding teacher professionalization, curriculum reform, and evaluation result in demands on universities to adapt to assessment, coursework, supervision, and the formation of professional ethics (Donovan & Cannon, 2018).

When teacher unions fail to influence policy windows at the national level, higher education often experiences a misalignment between practice and policy, as well as between what is taught and what is legislated (Tekir & Akar, 2019). The neglect of the ethical or judgmental

dimension of professional teaching frameworks, as mentioned in Kimathi & Rusznyak (2018), suggests that teacher educators lack substantial policy guidance for preparing teachers for relational and contextual judgment in classrooms. Prevailing scholarship on educational technology policy in higher education (Czerniewicz & Rother, 2018) reveals that institutional policies regarding e-learning or technology strategy are public texts reflecting institutional logic and strategic priorities. These arguments are influenced by state policy, union/stakeholder considerations, and funding related to what constitutes legitimate practice.

The policy influence of teacher unions, or the lack thereof, extends beyond basic education and intersects with university perspectives on teaching, pedagogy, technology, professional development, and alignment with national educational goals (Bascia, 2015). Policy windows may be missed due to institutional misalignment, where the government may create opportunities for reform, but teacher unions fail to align their inputs with political priorities or lack the capacity, coordination, or internal coherence to act when these windows open (Thomas & Xu, 2023). Recent media reports indicate that unions are expressing concerns regarding austerity, teacher burnout, mental health, and the removal of positions (Traianou, 2025). However, the extent to which these concerns translate into policy influence is contingent upon rhetorical framing, timing, and institutional opportunity.

This study addresses the gap in the literature by focusing explicitly on the national policy window in recent times, post-COVID-19, and investigating how teacher unions engage during this era, particularly in relation to higher education.

Further seeking to map institutional engagements and constraints, to track how unions' framing intersects with government agendas, and to explore the consequences for higher education curriculum, teacher training, and classroom practice. Furthermore, the study contributes to policy sociology within the field of higher education by examining how macro-level institutional processes inform educational practices comprehensively. As the boundaries between basic and higher education become increasingly porous due to teacher preparedness, curriculum articulation, and professional learning, teacher engagement with national policy emerges as a crucial determinant of coherence and quality across the educational spectrum.

Understanding the institutional misalignment that hinders union development in effectively leveraging policy windows offers significant implications for conceptualizing educational change, innovation, and equity within both school and higher education systems (Bush-Mecenas, 2022). This inquiry aims to highlight the institutional blind spots that create missed opportunities in policy reform. Raising questions about the conditions under which stakeholder groups, such as teacher unions, can reclaim policy influence in ways that advance teacher professional interests while also reinforcing and strengthening the knowledge base of teaching and learning across all levels of education (Chambers-Ju et., 2022). The article aligns with broader scholarly agendas by reframing and reimagining educational policy as a space for transformative practice rather than reactive negotiation.

2. Aim and objectives of the study

2.1. Aim of the study

This study critically examines the institutional positioning, strategic engagement, and practice-level influence of teacher unions in the context of school governance and professional management in post-COVID-19 South Africa.

2.2. Objectives of the Study

- To examine the institutional mechanisms by which teacher unions function within school governance and professional management frameworks.
- This study aims to analyze the strategic framing of teacher unions regarding their roles and their interactions with leadership and management amid reform and crisis situations.
- To investigate the role of teacher unions in mediating the relationship between policy frameworks and pedagogical practices via professional development and advocacy.
- To examine the temporal and institutional factors that facilitate effective influence and result in missed opportunities within the post-COVID-19 reform framework.
- To analyze the dual role of teacher unions as facilitators and limitations in the contexts of school leadership, governance, and reform processes.

3. Research questions

3.1. Main research question

What is the role of teacher unions as institutional stakeholders in school

governance and professional management in post-COVID-19 South Africa?

3.2. Sub-research questions

- What institutional mechanisms facilitate or limit the involvement of teacher unions in school governance and leadership frameworks?
- How do teacher unions strategically frame and position themselves during periods of reform, crisis, or policy transition?
- How do teacher unions convert policy frameworks into professional development practices and pedagogical implementation within schools?
- What institutional tensions, temporal misalignments, or strategic limitations affect the degree of union influence?
- What role does improved coordination among unions, school leadership, and governance structures play in reinforcing sustainable educational reform?

4. Theoretical framework and literature review

The formation of educational policy is seldom a rational process; rather, it involves negotiation, competing interests, and institutional constraints (Fast, 2016). In South Africa, teacher unions occupy a complex position, serving as both defenders of labour rights and potential policy entrepreneurs in education reform. However, their capacity to influence national policy, particularly in higher education and teacher education sectors, remains under-explored and uncertain (Msila, 2022). This section positions Kingdon's (1984) multiple stream framework as a robust analytical lens to

examine the circumstances under which teacher unions influence or fail to influence policy formulation.

The literature review underscores a persistent pattern; while teacher unions often succeed in shaping school-level and labour-related policies, their participation in policy formulation, particularly in higher education, remains fragmented. Consequently, policy windows often open and close without significant involvement from them.

4.1. Theoretical Framework: Towards Multiple Streams Framework (MSF)

The Kingdon Multiple Stream Framework (MSF) remains a highly influential model for analyzing agenda-setting and policy changes (van den Dool & Qiu, 2025). It posits that policymaking occurs through the interaction of three independent streams: the problem stream, where issues are recognized and framed; the policy stream, which involves the availability of technically feasible solutions; and the political stream, characterized by political will, institutional support, and public sentiment. When these streams are combined, a policy window opens, facilitating change, provided that policy stakeholders are prepared to seize such an opportunity (Kingdon, 2011).

In education, MSF assists in elucidating the reasons as to why certain reform initiatives, such as digital transformation, curriculum changes, and professional standards, gain momentum and traction while others stagnate (Yuliandari et al., 2023). In crises such as COVID-19, priorities are often reordered to facilitate new alliances among policymakers, higher education institutions, and teacher unions (El Masri & Sabzalieva, 2020). However, MSF alone does not fully encompass the deep

structural and cultural forces that condition how stakeholders should act within these streams. The representation of teacher unions in policy discourses does not necessarily translate into actual influence but highlights how norms, rules, routines, and power asymmetries within educational institutions and policy networks shape stakeholders' capacity for active participation (Scott, 2014; DiMaggio & Powell, 2020; Makoa & Segalo, 2023). Utilizing MSF facilitates a multidimensional understanding of teacher unions engagement, as MSF considers timing and opportunity.

4.2. Teacher Unions and Their Influence on Educational Policies

Teacher unions navigate a complex position between advocacy and obstruction. According to Msila (2022), unions in disadvantaged South African schools enhance professional identity, learner achievement, and democratic accountability in governance. However, Msila (2022) cautions that such influence rarely scales up to the national policy sphere, where union engagement tends to be reactive rather than visionary. Makoa and Segalo (2023) assert that while unions aim to shape discussions on teacher development, they face challenges in influencing initial teacher education curricula. This is primarily due to higher education institutions being governed by their own bureaucratic and academic logics. The misalignment between union advocacy and university autonomy illustrates the institutional barriers that MSF seeks to highlight.

4.3. Examination of policy windows and missed opportunities.

The COVID-19 pandemic created an unexpected policy window that temporarily alleviated the issue of educational disruption, policies related to digital and safety reform, and political dynamics concerning government urgency and public pressure (Sethi & Singh, 2024). Govender (2022) states that teacher unions were observed negotiating better protocols for school reopening and implementing precautionary health measures. In higher education, unions have not possessed the necessary institutional access and technical readiness to impact digital learning policy or resource allocation. Lie et al. (2021) observe that while national policies on digital transformation in teacher education have proliferated, these initiatives have predominantly followed a top-down approach, with minimal union involvement in the design or evaluation processes. A comparable pattern is evident in the teacher workload and accountability examined by Stacey, McGrath-Champ, and Wilson (2023) in Australia and related contexts. Although teacher unions articulated significant issues such as teacher burnout and the escalation of workload, their proposals were frequently sidelined due to a lack of political resonance or fiscal feasibility, hindering the integration of the three streams.

4.4. Framing, Capacity, and Legitimacy.

Recurring findings in teacher unions studies indicate that the manner in which ss frame policy issues critically determines their policy influence. When their framing aligns with government priorities such as equity, safety, or learning recovery, the policy window tends to open (Niu, 2025). During the pandemic, unions reframed teacher safety as a public health concern,

thereby aligning with the political stream. In domains such as critical pedagogy, union frameworks are frequently perceived as self-serving, thereby diminishing their legitimacy as policy partners (Govender, 2022). Capacity in this instance remains uneven, as many unions possess negotiation strength in labour matters but lack the technical policy expertise to engage in evidence-based policymaking (Msila, 2022). Thus, this capacity persists and explains why teacher unions may be present in the political stream but absent in the policy stream. Consequently, these gaps are not solely indicative of organizational weaknesses but are outcomes of historical institutional design, wherein unions are positioned as labour stakeholders rather than as co-designers of education policy (DiMaggio & Powell, 2020).

4.5. Institutional Limitations in Higher Education

Higher education policy represents distinctive institutional logics that tend to complicate union participation. Universities exist and operate under academic freedom, independence, and credit systems, which frequently marginalize external stakeholders such as teacher unions (Scott, 2014). Research on digital transformation in teacher education indicates that while the Department of Higher Education and Training promotes futuristic education via technological integration, most universities tend to interpret such mandates through academic lenses rather than labour relations (Li et al., 2021). Consequently, the teacher unions, by representing academic and student interests, actively participates in the institutional policy process. The professionalization agenda in higher education tends to prioritize experimental committees and accreditation bodies over

participatory forums. Consequently, this institutional closure restricts the diversity of policy networks, which is essential for integrating the three MSF streams previously discussed. Msila (2022) and Makoa and Segalo (2023) noted that when unions identify critical issues such as teaching conditions, workload, or professional ethics, universities tend to respond through internal committees rather than facilitating policy co-creation. This institutional path dependence sustains separation between the political and policy streams.

4.6. Application of MSF for Institutional Convergence

The policy influence process is shaped and conditioned by timing, institutional capacity, and framing through the use of MSF. Policy windows open when problem identification, solution availability, and political will coincide; however, lasting change necessitates institutional alignment and legitimacy (van Gestel, 2024). The framework guides inquiry across three analytical levels: the micro-level, which examines how union leaders and education officials act as policy entrepreneurs; the meso-level, which considers how organizational rules, norms, and culture (dis)enable participation; and the macro-level, which analyses how political cycles, public discourses, and crises create or close policy windows (Reza Pour & Mohammadi, 2024). The synthesis of MSF provides comprehensive lessons for analysing teacher union engagement in national education policy formulation. MSF elucidates the circumstances and timing under which opportunities for public influence emerge (Medadi & Mahdavi, 2025).

Recent studies conducted by Govender (2022), Li et al. (2021), Msila (2022),

Makoa and Segalo (2023), and Stacey et al. (2023) confirm that teacher unions remain important in explaining the professional and labour dimensions of educational improvement. However, their limited presence in higher education policymaking indicates a persistent disjunction between advocacy and policy entrepreneurship (Tomlinson, 2024). This study aims to theorize missed opportunities and identify how institutional redefinition or capacity development may enable unions to position themselves as legitimate co-creators of education policies rather than peripheral consultees. This contribution enhances the discourse on participatory governance and policy innovation in post-apartheid South Africa, illustrating how teacher unions can bridge the gap between professional expertise, institutional authenticity, and national policy transformation and development (Dadirai & Chauke, 2025).

5. Research Methodology

5.1. Research design and paradigm

This study employed a qualitative, interpretive research design situated within the broader field of policy sociology. The design's framing is appropriate as it seeks to explore meanings, policy discoveries, and institutional practices that shape teacher unions participation in policy formation. Cohen, Manion, and Morrison (2018) assert that qualitative research in education offers a nuanced understanding of institutional and social dynamics by situating stakeholders within their political and cultural contexts. The interpretivist design enables a thorough examination of how ss define their roles and how government institutions respond, as well as how the alignment and disjunction between the two create missed opportunities for policy influence.

5.2. Research context and sampling

The research was conducted within the South African national educational policy framework, involving stakeholders from basic education sectors. The Department of Basic Education, the Department of Higher Education and Training, and selected teacher unions constitute the institutional framework. Purposive sampling was utilized to identify information-rich participants (Patton, 2020). The participants included four school principals, four school management team members, and four teacher unions representatives. All twelve members were required to be affiliated with teacher unions to ensure the relevance of their knowledge. This selection ensures a representative cross-section of perspectives from the policy-practice interface, where institutional alignment or misalignment becomes evident. Therefore, 12 participants were targeted for in-depth semi-structured interviews, facilitating data saturation while ensuring interpretive depth.

5.3. Data collection methods

Data were collected via semi-structured interviews conducted with selected participants, lasting approximately 60 to 90 minutes. The semi-structured format allows for flexibility in exploring emergent themes concerning institutional alignment, advocacy strategies, and perceptions of policy influence. Document analyses were conducted, encompassing the strategic plan, union policy briefs, and public position papers, particularly in the context of the post-COVID-19 environment. The use of multiple sources facilitated data triangulation (Denzin, 2017), thereby enhancing the validity and trustworthiness of the findings.

5.4. Data analysis

Thematic analysis was conducted to inform the inductive reasoning process (Braun & Clarke, 2021). Inductive coding was employed to identify recurring themes, patterns, and styles derived from the participant narratives. The process involved several stages, including data familiarization through transcription and repeated reading, initial coding to capture discursive references to timing, influence, and institutional constraints, categorization of themes aligned with multiple streams, and cross-comparison between unions, state, and higher education perspectives to reveal contradictions and convergences. The final interpretive synthesis contextualized findings within the institutional logics of the South African education system, illustrating how teacher unions navigate and miss opportunities for policy windows due to systematic complications, discursive framing mismatches, and political sequencing.

5.5 The study limitation

The study acknowledged that qualitative, interpretivist research is inherently context-bound and therefore cannot be easily generalized. Its findings, however, provided an analytical generalization (Yin, 2018). By demonstrating institutional processes that may inform policy sociology and reform in comparable contexts. A further limitation is that teacher unions responses represent official discourses rather than internal debates or contestation. To address this issue, the analysis triangulated data from interviews, policy documents, and empirical literature conducted in this study.

5.6. Examination of Trustworthiness

To ensure the study's credibility, Lincoln and Guba's (1985) criteria for

trustworthiness were applied, which include credibility, transferability, dependability, and conformability. Credibility was established through prolonged engagement and triangulation via diverse data sources. Transferability was enhanced by offering detailed, contextualized descriptions of institutional interactions. Dependability was established through the maintenance of a transparent record of analytical decisions, while confirmability was ensured by keeping a reflective journal and engaging in debriefing sessions with academic colleagues in the field.

5.7. Consideration of Gatekeepers.

An ethical clearance certificate was obtained from the University of Johannesburg's ethical committee. All 12 participants were informed about the study's purpose, their voluntary participation, and their right to withdraw at any time without consequence. Additionally, confidentiality measures were discussed. In this context, pseudonyms were employed to safeguard the true identities of the participants. Consent was obtained for recording and utilizing the verbatim responses of

participants, and the research adhered to the guidelines of the Protection of Personal Information Act relevant to educational research in South Africa.

6. Presentation of data

This section outlines the presentation of data to address the research aims and objectives identified in sections 2.1 and 2.2 above. Below is a table of participants, followed by a discussion of the themes that emerged in this study to address the research questions and fulfil the research objectives. The presentation will commence by incorporating the perspectives of the participants, guided by the identified theme. Subsequently, a discussion of the findings will occur, informed by the reviewed literature. This acknowledges that data interpretation and data analysis are distinct concepts and should be treated separately. Data interpretation involves conveying understanding based on participant responses, while data analysis entails comparing the literature review with identified themes (Adewale & Potokri, 2022).

Table 1: Biographical table for participants

Participant Code	Position	Union Affiliation	Years of Experience	Highest Qualification
PSCH-1	Principal	NAPTOSA	23	MEd (Educational Leadership)
PSCH-2	Principal	SADTU	15	BEd Honours
PSCH-3	Principal	NAPTOSA	23	MEd (Policy and Management)
PSCH-4	Principal	NATU	28	BEd Honours
SMT-1	SMT Member (Departmental head)	NAPTOSA	14	BEd Honours
SMT-2	SMT Member (Deputy Principal)	SADTU	13	PGCE
SMT-3	SMT Member (Deputy Principal)	NAPTOSA	15	Bed
SMT-4	SMT Member (Departmental head)	NATU	14	MEd (Curriculum Studies)
UNIONIST-1	Unionist	NAPTOSA	18	MEd (Educational Policy)
UNIONIST-2	Unionist	NATU	14	BEd Honours
UNIONIST-3	Unionist	SADTU	12	BEd
UNIONIST-4	Unionist	NAPTOSA	21	MEd

Theme 1: Institutional Mechanisms and the Architecture of Influence

The participants consistently emphasize that teacher unions hold a structural position within the framework of school

management, leadership, and governance, thereby mediating between the regulatory framework imposed by the government and practices at the school level. SMT-1 observed that *“the influence of teacher unions in decision-making is beneficial, as*

teacher unions effectively engage educators in workshops concerning policy and act implementation guidance related to workplace conduct". A member of the union at School 3 reiterated the statement that *"The teacher union's primary function [is] as advocates for the teachers by negotiating terms and conditions of employment, safeguarding teachers' rights, and influencing school leadership through collective bargaining"* (Union-3). The participants emphasized that their responses are grounded in professional management and highlighted the significance of their role in school management, as it influences policy for positive change in various aspects. The principal-3 stated that *"Teacher unions serve as a voice for teachers in school governance and professional management, influencing education legislation at both provincial and national levels."* These inputs revealed that teacher unions function as stabilizing stakeholders within formal bureaucratic structures, ensuring that teacher voices are heard and represented in discussions where significant decisions regarding the school are made.

It was discovered that teacher unions operate through formalized mechanisms, such as collective bargaining and participation in processes where laws are enacted especially in normative mechanisms such as professional advocacy, development, and mentoring. However, participants also indicated the potential drawbacks of the role played by teacher unions in shaping the institution. Principal-2 stated that *"Job security is misunderstood for looking away when teachers disregard the main purposes of coming to work."* Similarly, SMT-1 remarked that *"Overprotection and support given to educators by the teacher unions have led our educators to become spoiled*

and reluctant to be self-motivated." The accounts illustrate significant tension, as unions legitimize teacher participation and professional standards while simultaneously fostering dependency and diminishing accountability measures. This reflects the dual logic of institutional isomorphism, wherein structures both contest and reproduce norms and standards.

Theme 2: Strategic Framing and Timing in Politics

Participants underscore that teacher unions influence is uneven and temporally sensitive, relying on the synchronization of actions directed at positive change with policy windows. SMT-2 indicated that *"Teacher unions ensure the implementation of decisions made by the union,"* while an SMT participant remarked, *"They negotiate on behalf of teachers to align leadership and management decisions with educators' best interests"* (SMT-3). Another SMT-2 stated that *"Through collective agreements, teachers' rights and welfare will stabilize the education system."* The accounts indicate that teacher unions are present and often actively leverage the political and legislative cycle to enhance their influence, particularly during crises such as COVID-19, when numerous policy reforms were rapidly introduced. Participants identified missed opportunities resulting from clearly identifiable limited engagement and misalignment with the intentions of the policy and practice.

SMT-4 indicated that *"the school is largely self-reliant on school improvement initiatives because our union members excluded themselves from the programs,"* while a principal noted, *"Individual capacity and potential are ignored in favour of communal or societal*

collegiality” (Principal-1). These reflections and inputs indicate that the mere existence of policy windows does not guarantee effective union influence; rather, success largely depends on both strategic framing and practical participation. This underscores the importance of temporal alignment between advocacy and bureaucratic responsiveness.

Theme 3: Translating Policy Influence into Pedagogical and Higher Education Practices

Participants express the view that teacher unions are well-positioned to play a significant role in professional development and in translating policy advocacy into concrete pedagogical practices. Principal-3 stated that *“They ensure that teachers are updated with current teaching methods and maintain high standards,”* while Unionist-3 noted that *“Teacher unions ensure that teachers undergo ongoing professional development by organizing and conducting workshops to improve learner outcomes.”* Additionally, Unionist-4 remarked that *“Teacher unions have an enormous role in school improvement because [they] motivate teachers to perform well... adhering to educational laws and policies.”* The highlighted points emphasized the role of teacher unions as intermediaries, converting macro-level policy frameworks into classroom practices and professional routines.

Participants also noted a tension between union advocacy and managerial expectations. One participant, identified as Principal-3, noted that *“Sometimes the teacher unions undermines the effectiveness of the school, especially when the management does not belong to the same union.”* Additionally, SMT-4 cautioned that *“Unions can undermine the*

Leadership and Management System of the school by making unrealistic demands.” This indicates that the implementation of policy in practice depends significantly on trust, collaboration, and alignment among the teacher unions, school management team, and school governance. It highlights that pedagogical influence is not assured, even with active union involvement at the school level.

Theme 4: Missed opportunities and institutional temporalities in post-COVID era reformation.

The post-COVID-19 period presented teacher unions with unprecedented opportunities to influence school improvement and to assume leadership in crisis management. The SMT-1 indicated that *“leadership and management practices achieved stability and momentum due to the involvement of the teacher unions”*. The feedback provided significantly aids management, while principals noted that *“it (teacher unions) ensures compliance with legal jurisdictions and adherence to legislative frameworks”* Principal-1. Despite these notable contributions, participants underscored drawbacks in institutional and communication delays that limited the long-term impact. A union member noted that the challenges include the rapid receipt of messages or information. *“This indicates a communication breakdown between the employer and employee”* (Unionist-2).

Principal-2 noted that there is a communication breakdown between the employer and employees. The participant also projected avenues for enhanced synergy. Unionist-3 asserted that *“school leaders, policymakers, and teacher unions should define clear, shared objectives, promote open communication, and implement policies that enhance teacher*

autonomy and professional development". Similarly, SMT-4 emphasized that "*unions require a larger platform and additional resources to facilitate and conduct professional workshops aimed at fostering collaboration among teachers from various schools*". These reflections indicate the potential for temporal re-synchronization, emphasizing the importance of transforming reactive crisis responses into proactive institutional partnerships that can sustain post-pandemic reform and professional development.

Encounters regarding the identified themes

The results demonstrated that teacher unions operate within a complex institutional ecosystem that is characterized by structured, contingent, and strategic impact. This was the case across all four aspects that were explored. To consolidate governance systems, to act as a mediator between policy and practice, and to advocate for professional development are all functions that teacher unions provide. On the other hand, they are confronted with ongoing restrictions as a result of temporal misalignment, managerial contestation, and deficiencies within the institutions that they intend to serve. Therefore, the incorporation of participants sheds light on the complex and frequently contradictory ways in which unions exert their influence over policy, highlighting the dual ability of unions to act as both enablers and inhibitors of any educational reforms that may be implemented. This highlights the importance of intentional institutional coordination, continuing engagement, and the creation of trust among teacher unions, school administration, and policymakers in order to guarantee that policy possibilities

are effectively utilized for meaningful and long-lasting systemic impact.

7. Discussion of findings

Finding 1: Institutional Mechanisms and the Architecture of Influence

Educational policy formulation is often depicted as consultative, rational, and evidence driven. However, underlying this inclusive discourse is a complex framework of institutional mechanisms that determine which voices influence reform, and which are marginalized (Adams, 2016; Rinquest & Simba, 2024). The institutional approach emphasizes the role of organizational norms, professional hierarchies, and policy procedures in shaping influence through both formal and informal mechanisms. In this context, teacher unions function as both advocacy agents and essential elements of the bureaucratic and professional framework that supports governance structures.

Scott (2014) and DiMaggio and Powell (2020) define institutions as frameworks of rules, norms, and collective understandings that shape behavior and confer legitimacy to authority. Teacher unions obtain legitimacy through formal mechanisms, including collective bargaining, consultation, and participation in statutory forums. Additionally, normative mechanisms such as professional ethics, mentoring, and representational functions reinforce their credibility. However, these institutional structures also limit innovation, as bureaucratic routines frequently prioritize compliance over creativity (Makoa & Segalo, 2023).

Kimathi and Rusznyak (2018) empirically demonstrate that professional frameworks, including the IQMS and the teachers' code of ethics, institutionalize professionalism primarily through regulation rather than

relational ethics. Kruger (2019) critiques this as a form of “technocratic professionalism” that marginalizes ethical judgment. Msila (2022) similarly concludes that union influence generally reinforces existing institutional arrangements rather than effecting transformation. Therefore, although teacher unions contribute to stability and policy coherence, their integration within bureaucratic frameworks may perpetuate dependence and restrict transformative agency.

In summary, the literature on this theme indicates that the "architecture of influence" positions unions as legitimate but constrained policy actors, both sustaining and limited by the institutions they aim to influence.

Finding 2: Strategic Framing and Timing in Politics

Policy influence depends significantly on strategic framing and timing, in addition to institutional authority. The literature indicates that policy change occurs episodically rather than continuously, arising when problems, political will, and viable solutions converge (Kingdon, 1995; Perks & Gilchrist, 2022). This alignment, termed a "policy window," elucidates why certain union initiatives gain traction while others fade away. In the educational context, the policy influence of teacher unions is contingent upon the framing of their concerns in relation to governmental priorities and the timing of their interventions (Finger, 2019). Msila (2022) notes that unions frequently adopt a reactive stance instead of a strategic one, addressing crises rather than proactively influencing long-term reform agendas. Govender (2022) indicates that

although unions negotiated health protocols during COVID-19, their involvement was primarily procedural rather than transformative.

The literature highlights that effective framing—connecting teacher welfare to systemic stability or equity—can transform advocacy into institutional change (Niu, 2025). When unions focus narrowly on labor rights, they risk becoming politically marginalized. DiMaggio and Powell (2020) assert that institutional power is contingent upon legitimacy; framing that aligns with state objectives bolsters legitimacy, while oppositional framing may exacerbate exclusion. The literature depicts teacher unions as policy actors whose effectiveness depends on aligning framing and timing with political opportunities. Missed windows, delayed responses, and misaligned narratives result in reduced influence, establishing the conceptual basis for the empirical accounts of "missed opportunities" identified in your data.

Finding 3: Translating Policy Influence into Pedagogical and Higher Education Practices

Research on the professionalization of teaching positions teacher unions at the confluence of policy advocacy and pedagogical practice. The National Policy Framework for Teacher Education and Development (Xaso et al., 2017) highlights the importance of continuity between initial teacher preparation and ongoing professional development, identifying unions as potential collaborators in professional learning. Aydarova et al. (2022) demonstrate that universities serve as policy mediators, where state directives, union demands, and pedagogical practices intersect.

Empirical studies indicate that the translation from policy to practice is inconsistent. Donovan and Cannon (2018) observe that higher education institutions frequently interpret national policy mandates in terms of academic autonomy rather than through participatory inclusion. Tekir and Akar (2019) note a misalignment between legislation and educational practices, highlighting that teacher educators frequently lack adequate guidance on relational or contextual judgment. Czerniewicz and Rother (2018) demonstrate that in technology policy, it is institutional logic, rather than union advocacy, that defines legitimate practice.

Lie et al. (2021) and Stacey, McGrath-Champ, and Wilson (2023) support this finding by showing that, although unions express pedagogical concerns like workload and burnout, their proposals are frequently overlooked due to bureaucratic or financial limitations. This scholarship reveals that union advocacy often remains confined to the policy level, showing minimal impact on the pedagogical and curricular aspects of higher education. Thus, literature on this theme frames the policy-to-practice gap as an issue of both institutional and communicative nature, wherein unions' attempts to impact pedagogy are influenced by academic hierarchies, governance frameworks, and interpretive autonomy.

Finding 4: Missed opportunities and institutional temporalities in post-COVID era reformation.

The COVID-19 pandemic established a unique and pressing policy opportunity, momentarily easing bureaucratic constraints and enhancing the visibility of unions (Sethi & Singh, 2024). This period revealed institutional and temporal misalignments that hindered enduring

reform. Govender (2022) notes that unions played an active role in negotiating reopening protocols; however, their impact was limited to health and safety issues rather than facilitating structural transformation. Lie et al. (2021) and Stacey et al. (2023) document that post-pandemic digital transformation and workload reform occurred largely without significant union input, indicating a disconnect between problem recognition, solution availability, and political will.

Makoa and Segalo (2023) elucidate this inertia by examining institutional temporality, which refers to the delay between bureaucratic decision-making and stakeholder mobilization. Unions frequently respond to immediate crises instead of formulating long-term agendas. According to Thomas and Xu (2023), capacity limitations, coordination challenges, and a lack of coherence hinder unions from capitalizing on transient opportunities. Yuliandari et al. (2023) and El Masri and Sabzalieva (2020) observe that crises can realign priorities and create new alliances; however, in the absence of institutional readiness and shared legitimacy, these alliances tend to be ephemeral. According to Bush-Mecenas (2022) and Chambers-Ju et al. (2022), missed policy windows indicate not apathy but rather structural exclusion, institutional path dependence, and inadequate temporal synchronization between union and government cycles.

The literature on this theme depicts the post-COVID-19 era as a period characterized by both potential and institutional inertia, wherein the inability to synchronize issues, policies, and political dynamics led to missed reform opportunities. This establishes an essential context for analyzing participants'

reflections on communication failures, time delays, and requests for enhanced collaboration.

8. Conclusion and recommendations

This study analyzed the role of teacher unions in school leadership and governance during the post-COVID reform period, emphasizing the dynamics of policy windows and missed opportunities. The findings indicate that teacher unions hold a constitutionally valid but structurally limited role in school governance and professional management systems. Unions stabilize institutional processes and offer professional guidance on policy enactment through formal mechanisms like collective bargaining and statutory participation. These mechanisms may also perpetuate dependency, diminish individual accountability, and reinforce bureaucratic inertia. The research indicates that the influence of unions is dependent on temporal factors. The effectiveness of unions in converting their institutional access into meaningful influence is largely influenced by strategic framing and timing. Unions utilize collective bargaining cycles and crisis situations to exert influence; however, their involvement frequently tends to be reactive instead of proactive. Policy windows are not solely missed because of organizational inefficiency; they arise from fundamental misalignments among institutional rhythms, leadership expectations, and political responsiveness. Unions serve as intermediaries in pedagogical practice, facilitating the connection between policy and classroom implementation via professional development, mentoring, and advocacy. Tensions emerge when representational priorities clash with managerial coherence, complicating collaborative reform efforts. The post-COVID context revealed this

duality: unions played a role in stabilization and compliance during the crisis; however, communication breakdowns, delayed coordination, and strategic fragmentation hindered sustained reform influence. Collectively, these findings indicate that the role of teacher unions in school leadership reform is not inherently obstructive nor consistently transformative. It is instead embedded within institutions, sensitive to temporal contexts, and negotiated through relationships. Missed policy windows reflect structural conditions within governance ecosystems rather than isolated failures of union intent. Reevaluating the role of teacher unions necessitates a shift from reactive labor advocacy to a more strategic, coordinated, and temporally informed approach to participation in school leadership reform.

Recommendations

1. Defining Institutional Mandates

Clearly defined and formally articulated mandates should delineate the role of teacher unions in school governance and leadership reform. This encompasses organized involvement in policy implementation forums, supervision of professional development, and advisory procedures. Minimizing ambiguity enhances accountability and maintains representational legitimacy.

2. Enhancing strategic and analytical capabilities

Teacher unions ought to allocate resources toward policy analysis, strategic planning, and proactive engagement strategies. Enhancing the capacity to identify and prepare for emerging reform moments will improve the ability to influence policy change rather than simply respond to it.

3. Enhancing platforms for collaborative governance

Formalization of institutional platforms that enable ongoing dialogue among unions, school management teams, and governing bodies is essential. Mechanisms for trust-building, collaborative professional development initiatives, and co-designed leadership workshops can reduce adversarial tensions and enhance policy coherence.

4. Establishing a Framework for Policy Window Monitoring

Unions and school leadership structures ought to establish systems for the proactive

monitoring of policy developments and reform cycles. Enhanced communication protocols among stakeholders will mitigate temporal misalignment and facilitate timely, coordinated intervention.

5. Promoting Alignment in Post-Crisis Reforms

Post-COVID reform processes must shift from emergency stabilization to a focus on long-term strategic collaboration. Resource allocation, shared planning frameworks, and joint reform agendas can facilitate the transition from crisis-era engagement to enduring institutional partnerships.

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