



Education leadership

Scoping, perspectives and future trajectory



Edited by Leentjie van Jaarsveld,
Charl C. Wolhuter & C.P. van der Vyver

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Published by AOSIS Books, an imprint of AOSIS Publishing.


AOSIS Publishing

15 Oxford Street, Durbanville 7550, Cape Town, South Africa
Postnet Suite 110, Private Bag X19, Durbanville, 7551, Cape Town, South Africa
Tel: +27 21 975 2602
Website: <https://www.aosis.co.za>

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Published in 2022
Impression: 1

ISBN: 978-1-77995-221-9 (print)
ISBN: 978-1-77995-222-6 (epub)
ISBN: 978-1-77995-223-3 (pdf) 

DOI: <https://doi.org/10.4102/aosis.2022.BK383>

How to cite this work: Van Jaarsveld, L, Wolhuter, CC & Van der Vyver, CP (eds.) 2022, *Education leadership: Scoping, perspectives and future trajectory*, AOSIS Books, Cape Town.

Printed and bound in South Africa.

Listed in OAPEN (<http://www.oapen.org>), DOAB (<http://www.doabooks.org/>) and indexed by Google Scholar.
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Research justification

Leadership in education has been demonstrated to make a measurable and significant impact on the success of schools and the achievement levels of learners. The obvious field of scholarship to guide this endeavour of leadership in education is of recent origin, but it is vibrant and growing. This volume displays the scope and range of the emerging scholarly field of *education leadership* by means of chapters zooming in on various areas of research in the field. This book takes as the point of departure and as a base reference point a scoping exercise on literature regarding the teaching of education leadership. The ensuing chapters, focusing on various areas in the field of education leadership scholarship, are ordered in the following categories: chapters dealing with teacher leadership, chapters dealing with school leadership and chapters dealing with mid-level leadership. The section on teacher leadership contains a chapter on collective teacher efficacy in high-performing high schools in South Africa. The section on school leadership contains four chapters dealing with (1) leadership and leadership challenges faced by school principals of special education schools, (2) entrepreneurial leadership as a key leadership style in uncertain times, (3) perceptions of school staff and school governing bodies regarding the use and maintenance of ageing school facilities in Gauteng and (4) continuous professional development of teachers in Namibia. The section on mid-level leadership has three chapters. The topics of these chapters are challenges and expectations regarding role conflict and role ambiguity in mid-level management in primary schools, the instructional leader's role of heads of departments (HoDs) at parallel-medium primary schools and views from HoDs, principals and department officials on enabling HoDs for their curriculum leadership roles. These chapters employ a variety of research methods. Some chapters are position papers and conceptual chapters, while others are based on empirical research. Chapters of this book explicate and display leadership perspectives on an assortment of critical issues besetting education systems and facing schools, and thus they draw attention to some aspects of the scholarly field of education leadership that are critical in advancing the field. The research reported on in each of the chapters does not only give clear indications as to how and where to improve practice, but it also opens vistas for new and future research, suggesting to scholars in the field promising ways to take the field forward with research critical to the continual advance and relevance of the field.

The chapters constitute original research not previously published elsewhere. All chapters have been written by scholars in the field of education leadership for scholars in the field of education leadership. Where a chapter is based on research from a dissertation or thesis, pertinent information is clearly indicated in the chapter. In such cases, the chapter also represents more than a 50% substantial reworking of the dissertation or thesis. The target readership of the book is scholars in the field of and specialists in education leadership and policies regarding education leadership. Following a widely circulated call for papers, several manuscripts were submitted. All chapters were copy-edited by an accredited language editor and then put through applicable software to ensure that no plagiarism had occurred. The chapters were then peer-reviewed by a panel of national and international reviewers. The reviewed chapters were then returned to the authors for revision, and only chapters revised to the satisfaction of the editors and the publishers were published.

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List of abbreviations and acronyms

CELDS	Centre for Education Leadership Development and Support
CPD	continuous professional development
CPDP	continuous professional development programme
CTE	collective teacher efficacy
CTES	collective teacher efficacy scale
DBE	Department of Basic Education
EASA	Education Association of South Africa
ELHC	Education in Languages, Humanities and Commerce
ELI	Education Leadership Institute
EMASA	Education Management Association of South Africa
EPA	Environmental Protection Agency
ERIC	Education Resources Information Center
GSB	Gabaldon School Buildings
GTC	general teaching competence
HGSE	Harvard Graduate School of Education
HoD	head of department
IJERE	<i>International Journal of Evaluation and Research in Education</i>
IJES	<i>International Journal of Education Sciences</i>
IQMS	Integrated Quality Management System
JD-R	job-demands resources
LoLT	language of learning and teaching
NEIMS	National Education Infrastructure Management System
NRF	National Research Foundation
NWU	North-West University
OECD	Organisation for Economic Co-operation and Development
PAMs	personnel administrative measures
PSFs	professional support forums
REAL	Research in Education Administration and Leadership
SAJE	<i>South African Journal of Education</i>
SAT	scholastic aptitude test
SDG	sustainable development goal

SEND	special needs education
SES	socio-economic status
SGB	school governing body
SMT	school management team
SLPs	short learning programmes
TALIS	International Teaching and Learning Survey
TOIBO	Transoranje Institute for Special Education
UFS	University of the Free State
UJ	University of Johannesburg
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNICEF	International Children's Emergency Fund
UNISA	University of South Africa
UP	University of Pretoria
UWC	University of the Western Cape
VIA	values-issues-action
WSE	whole schools evaluation

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Preface

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The chapters of this book present the perspectives of education leadership on a range of issues in schools (South African schools in particular) and on particular parts of education leadership as a scholarly field. As such, it is aimed at education leadership scholars. The authors are researchers and lecturers of education leadership attached to the Faculty of Education, from the North-West University (NWU) in South Africa.

Focal issues in schools – South African schools in particular – within this book include maintaining infrastructure in schools and the exercising of leadership in schools with children with special education needs. Other aspects of the field coming under the spotlight are research on the teaching and learning of education leadership, or education leadership training, and the notions of distributed leadership and entrepreneurial leadership, both of which are currently highly rated in the scholarly and public discourse on education leadership. The topics touched upon in each chapter are not only stimulating in themselves, offering something of value to a range of constituencies, but each chapter also leads to new questions and points to new avenues to explore.

It is trusted that the chapters in this volume will stimulate and guide the diverse potential readership of the volume to study this field further, to benefit, in all seriousness, from the knowledge the field has to offer to improve leadership practice while embarking on their own research to take the field of education leadership scholarship forward.

How to cite: Wolhuter, CC 2022, 'Preface', in L. van Jaarsveld, CC Wolhuter & CP van der Vyver (eds.), *Education Leadership: Scoping, perspectives and future trajectory*, AOSIS Books, Cape Town, pp. xxvii-xxvii. <https://doi.org/10.4102/aosis.2022.BK383.00>

Part 1

Introduction

Surveying the panorama and zooming in on perspectives to chart a future trajectory for a young but surging field of scholarship

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■ Abstract

This is the introductory chapter of the volume entitled *Education leadership: Scoping, perspectives and future trajectory*. This chapter offers a prospectus of the chapters in the book. The chapter commences with an explanation of the pivotal importance of leadership in any education project. The state of education leadership as a young and still very much underdeveloped but promising field of scholarship is then discussed. A summary of the findings of Chapter 2, the teaching of education leadership, is provided. Four salient themes in the literature transpired. These are the objectives of teaching education leadership, the selection of students for education leadership courses, the curriculum and competencies to be cultivated in education

How to cite: Wolhuter, CC 2022, 'Surveying the panorama and zooming in on perspectives to chart a future trajectory for a young but surging field of scholarship', in L van Jaarsveld, CC Wolhuter & CP van der Vyver (eds.), *Education Leadership: Scoping, perspectives and future trajectory*, AOSIS Books, Cape Town, pp. 3-11. <https://doi.org/10.4102/aosis.2022.BK383.01>

leadership programmes and the pedagogy or method of teaching and learning. The content of each of these themes is reported and critically interrogated. The corpus of literature on the teaching of education leadership as a reference point for the ensuing chapters in the book is then motivated. A summary of each of the constituent chapters of the volume is given, and the contribution of each chapter in the volume is highlighted.

■ Introduction

This volume displays the scope and range of the emerging field of scholarship of *education leadership* and aims to identify key areas for the improvement of practice and for future research by means of chapters zooming in on various areas of research in the field, taking a scoping exercise on literature on the teaching of education leadership as a point of departure and as a base reference point. This first chapter offers a prospectus of the chapters in the book. At the end of the volume, the concluding chapter will reveal the implications of what was reported in those chapters for practice as well as for future research, that is, to find markers for a future trajectory of the field.

■ Education leadership

At a time in history when humanity has placed its trust in education to take on any challenge in the world and has, as a result, made massive investments in education, education leaves much to be desired. Whether in terms of supplying access for all in institutions of education, ensuring quality education for all, ensuring equity or equality in education or succeeding in achieving the outcomes and objectives laid out in the education project, there is a clear lack. As is stated in Chapter 2, backed up by ample citations of empirical studies proving the point, leadership in education institutions can make a significant, even pivotal, difference in the supply or lack of quality education and the achievement of education objectives and outcomes. In view of this critical factor in the education equation, it is commendable and heartening to see a new field of scholarly enquiry, education leadership, rising to the occasion. Such a scholarly field should then serve to guide practice regarding education leadership, resulting in ever-better education leadership. Being of recent origin, however, the field is still unstructured, amorphous and grossly unexplored. The result is that many scholars in cognate fields of scholarship – and even more so practitioners (that is, education leaders in schools) and students of both initial teacher education programmes and postgraduate programmes of education – are oblivious to the scope and promise of the field. Moreover, even scholars within the field often lack a panoptic view of the field and are not aware of the entire range of scholarship and their varied focus or promising ways to take the field forward. This book displays the scope and range of the emerging field of scholarship in *education leadership*

and aims to identify key areas for the improvement of practice and for future research by means of chapters zooming in on various areas of research in the field, taking as a point of departure and as a base reference point a scoping exercise on literature on the teaching of education leadership.

The survival and growth of the scholarly field of education leadership depends upon the teaching of the field. This is so because, firstly, it is only by transmitting the established body of knowledge to students that this latter constituency – the education leaders in practice – will acquire such knowledge to be implemented in the improvement of practice. It is also only by teaching the field that students will be introduced to the field and its methods of doing research and thus be able to continue the scholarly activity in the field. Therefore, this volume commences with a chapter surveying the literature on the teaching of education leadership. The author and editors also believe that a survey of literature on the teaching of education leadership will also offer a view of the entire field of education leadership, as the curricula of education leadership would reflect the entire corpus of literature in the field. Within this panorama, each of the subsequent chapters offers a perspective on research currently conducted by a researcher at a South African university in one part of the field of education leadership. Each of these perspectives should be placed within the panoptic view emerging from the first chapter, and these suggestions as to the improvement of practice and the further development (key issues for the research agenda) of the field of education leadership will be revealed in the concluding chapter.

Chapter 2 then reports the findings of a literature survey on the teaching of education leadership. Four salient themes in the literature transpired. These are the objectives of and in teaching education leadership, the selection of students for education leadership courses, the curriculum of and competencies to be cultivated in education leadership programmes and the pedagogy or method of teaching and learning. The contents of each of these themes are reported and critically interrogated.

Chapters 3–11, each reporting on the research foci of scholars, are grouped into three sections. These are teacher leadership, school leadership and mid-level leadership.

■ Teacher leadership

On teacher leadership, Branwen H. Challens and Madimetsa J. Mosoge's chapter (ch. 3) deals with collective teacher efficacy in high-performing high schools in South Africa. In several chapters within this book – such as the first chapter on education or training for education leadership, or the chapter on entrepreneurial leadership in schools (ch. 5) – it is pointed out how the neoliberal education revolution that has swept forcefully throughout the world over the past 30 years has also made its presence felt in the world of education

and education leadership. This is, *inter alia*, in the form of performativity; the pursuit of the profit motive; the pursuit of efficiency, efficacy and productivity; accountability; and how all these gave rise to an entire culture of managerialism, which has come to strongly define the work of the education leader in the current age (see Lingard & Rawolle 2011).

It was pointed out in these chapters how this culture is pernicious to many desiderata in the professional lives of education leaders, for example, the need to be entrepreneurial (ch. 7). However, the measurement of, for example, efficacy and the practice of 'whole schools evaluation' (WSE) has come to stay and will probably become permanent; although it should be added that one wishes for this to occur in a more congenial way than what many of its critics have deemed it to be today. This necessitates a look at how school leaders did successfully respond to these exigencies brought by the neoliberal economic revolution context in which they now find themselves. New arrangements such as WSE, which has become part of education management in South Africa, also present an opportunity, firstly, for school leaders to keep their fingers on the pulse of their institutions and, secondly, for a database and conceptual tools for scholars of education to work with. That is, of course, as long as they are always mindful (in both their own research and in conveying the results of their research to their readerships) of the caveats and dangers involved in a culture of managerialism.

One example of education leadership research that can draw on the database and the conceptual instrumentation yielded by the culture of managerialism without buying into this culture is the kind of research reported in Chapter 5. The authors report on research they have conducted on collective teacher efficacy and its interrelationship with leadership in a school. The authors used Albert Bandura's social cognitive theory as a theoretical framework and applied the collective teacher efficacy scale (CTES) questionnaire to teachers of ten high-performing South African schools across the spectrum of well-endowed schools and poorly endowed schools. The teacher is an important factor in the success equation of the education supplied in a school (see Wolhuter & Van der Walt 2018). On the other hand, the concerns that can be raised against the fixation on performance appraisal brought by the neoliberal economic revolution in education (see Wolhuter & Van der Walt 2019) are equally valid, and this chapter thus focuses on an important facet of teacher leadership.

■ School leadership

The section on 'School leadership' commences with a chapter entitled 'School principals of special education schools: Leadership and challenges', authored by Leentjie van Jaarsveld. One of the driving forces of the global education expansion project, which has been sweeping over the Earth for the past

75 years, has been the creed of human rights, particularly the right to education (see Wolhuter & Van der Walt 2019). The right to education has been conceptualised as including everyone, and global initiatives such as Education for All, the Millennium Development Goals and lately the Sustainable Development Goals (SDGs), with its education component belaboured in the INCHEON Declaration and national policies such as 'No Child Left Behind' in the United States of America (USA) are evidence of that. Education is highly rated not only as a human right but also as an instrument to attain the SDGs – humanity's collective vision for itself and for the world by 2030. Goal 4 of the SDGs, formulated as 'Ensuring inclusive and equitable quality education and promote lifelong learning opportunities for all' is, within the set of 17 SDGs, not only seen as a goal in itself but as a means to realise the other 16 SDGs (see Wolhuter 2022).

One category of learners who have been given special attention in human rights manifestos, education systems and education scholarships is special needs learners, to the extent that a distinct field of scholarship entitled 'special needs education' (known as 'SEND education') has arisen in recent times. Children with special education needs are not only a category of children on their own, but internally they represent a wide diversity of children. School leaders working in schools with SEND children find themselves in an environment not only with distinct leadership challenges but with more diversity than the typical school. In Chapter 3, the author surveys literature on leadership of schools with learners with special education needs. A glimpse of the diversity and hence diverse challenges posed by schools with SEND children is given in the chapter. The author then reports on an empirical study in which she probed four principals of schools for hearing-challenged children on their leadership experience and challenges.

Education leaders, and school principals, in particular, find themselves torn between two opposing demands. On the one hand, the demands of the 21st-century world and the nature of the work of a dynamic leader ask for initiative. These particular features and demands of the 21st century include the faster rate of change and the need to respond promptly to change, as well as the cut-throat competitive nature of a globalised world where schools and other institutions of education, including universities, are part of a race to perform better on league tables (these include both national assessment test series and international test series) and (in the case of universities) places on the global university rankings. To open opportunities to each individual student as well requires entrepreneurial leadership, especially in view of the increasingly diverse make-up of education institutions. On the other hand, the culture of managerialism, performativity and compliance culture, brought by the neoliberal economic revolution and aggravated by the particular contextual ecology in which South African principals find themselves, are hampering any gesture of creativity or taking of initiative. Yet, as alluded to earlier, one way

to overcome the many adverse conditions imposed on schools in the Global South by context is through innovative, inclusive entrepreneurial leadership. The second chapter in the section, Chapter 5, written by Jan B. Khumalo and Leentjie van Jaarsveld, deals with entrepreneurial leadership, described as a key leadership style in uncertain times. The authors report on their research, based on interviews on entrepreneurial leadership with four purposively sampled (information-rich) principals of South African schools.

In Chapter 6, entitled 'Using and maintaining ageing school facilities in Gauteng: Perceptions of school staff and school governing bodies', Velaphi A. Nhlapo highlights the maintenance of ageing facilities at schools in South Africa's most populous and economic core province, Gauteng. The chapter offers a perspective from education leadership on this issue. Two of the major criticisms against the pre-1994 education dispensation were inequality and, in particular, inequality in terms of physical facilities (e.g. see Christie 1989:127). Sadly, woefully inadequate infrastructure and physical facilities, and the maintenance thereof, remains a reality in many of the historically black schools in South Africa to this day. Of the more than 25 000 schools in South Africa, 171 have no water supply and 5 004 have unreliable water supplies, 1 116 have facilities for athletics, 1 327 have an intercom system, 10 726 have a landline telephone and 5 471 have a library, while only 41.38% have computers (Republic of South Africa [RSA] 2016). The author of the chapter also cites frightening statistics to back this claim of a lack of appropriate facilities in schools in South Africa, particularly in historically black schools. Bloch (2009), in his much-read volume on the state of South Africa's schools, fittingly titled *The toxic mix: What's wrong with SA's schools and how to fix it*, states that 60%–80% of South Africa's schools are dysfunctional, turning out alums who are barely literate or numerate. To place matters in context, two points should be raised here. Firstly, per-learner spending on education in South Africa is relatively high compared to other middle-income countries (cf. Wolhuter 2014; Wolhuter & Van der Walt 2018). This supports the allegation that a weak point in the South African education system is the administrative, management and leadership layers. This suspicion has been confirmed by research on how top-performing schools manage to succeed (cf. Wolhuter, Van Jaarsveld & Challens 2018). With the focus in South Africa stretched to its limits, the chances of securing more funding for the upgrading and replacing infrastructure are remote. This leaves leadership as the obvious area to care for, maintain and secure infrastructure. To link to an earlier and a later chapter in this volume dealing with entrepreneurial leadership, the notion of entrepreneurial leadership in education should be explored. Innovative leadership may go a long way to ensuring that schools have proper infrastructure.

In the final chapter in the section on school leadership, Chapter 7, Johannes Kayumbu and Leentjie van Jaarsveld offer a perspective from Namibia. The contemporary world is one of continuous change. As the saying goes: 'there

has been a fantastic change in the rate of change'. This has necessitated the development of strong systems of continuous professional development in any profession to ensure that such professions can continue to provide their high standards of service. This also applies to the teaching profession.

Namibia reveals an interesting case where change and the exigency of change are amplified by the nature of it being a recently created education system (1990, at the time when the country became independent), still being under construction and representing a radical break from the pre-1990 dispensation (cf. Likando & Wolhuter 2013). At the same time, it is embracing an ambitious vision for 2030 which is linked to the global community's vision for education in the world by 2030. This entire project places an immense but stimulating challenge before education leadership in the country.

■ Mid-level leadership

This section focuses on mid-level management. Scholarship on education leadership tends to focus on the school principal. A tier of leadership long neglected, yet with its own contribution to leadership in education and education institutions, is that of the mid-level managers (see Koetaan 2020). Standing first in the management or leadership line, next to workers at the coalface (in the case of schools and teachers), mid-level leaders play a particularly pivotal role in institutions that are part of education systems that are undergoing restructuring or transforming (Brancato 2003:59; Mahavong 2014:3). Finding themselves sandwiched between principals and the district on the one end, the provincial and national hierarchy above them, teachers on the other side and learners beneath, mid-level education leaders experience role uncertainty, role ambiguity and role conflict. In these current times of managerialism, performance appraisal and monitoring, these middle-level managers find themselves in the unenviable position of having to administer these to their subordinates, and they have to motivate and inspire their subordinates to comply with such a regiment of managerialism. Middle-level managers further suffer from a lack of autonomy and authority or power. Using the job demands resources (JD-R) theory as a theoretical framework, Sanet Myburgh and Corné van der Vyver, in the opening chapter (ch. 8) of this section, report on their investigation of the experiences of several HoDs in South African schools.

The formation of parallel-medium schools (a fast-growing category of South African schools) has created a new niche and exigency for leadership at this level in such parallel-medium schools. Globally, an unresolved issue in education is that of the language of learning and teaching in institutions of education (cf. Wolhuter & Van der Walt 2022a). The problem is that only a few languages in the world are employed as languages of learning and teaching even at the primary school level, less so at the secondary school level and even less at the

level of higher education. This violates the human rights of many who do not receive education through the medium of their first language. It hampers the development of such languages, adversely affects the learning and education progress of those who have to learn through the medium of a second, third or foreign language, aggravates inequalities in education, and it works against the goal of creating human capital through education (cf. Wolhuter & Van der Walt 2022a). However, today 37% of learners from middle- and low-income countries receive education through a medium other than their first or home language or mother tongue (World Bank 2021:20).

In the particular societal and education system contextual ecology of South Africa, this issue of the language of learning and teaching in education institutions has also acquired a political dimension (cf. Wolhuter & Van der Walt 2022b). Even before the political dimension is added to the calculus, the language situation in South Africa is complex and is getting ever more complicated. The country has 11 official languages, and, as per the Constitution, all are equal. However, this does not reflect the complexity of the language landscape of the country. Recently, the principal of a school in an upper-middle-class residential suburb of Cape Town reported that amongst the learners in the school, there are a total of 37 home languages (Mafisa & Booysen 2022).

One promising way to begin to develop or capacitate more languages as languages of learning and teaching in education institutions has been through policies and practices of multilingual education, ranging from creating institutions where particular languages of learning and teaching will be used to options of parallel-medium and dual-medium teaching.

In South Africa, too, parallel-medium schools make up a fast-growing category of schools. What makes the process more challenging, particularly from a leadership point of view, is that many once unilingual schools went the way of parallel-medium against the wishes of many teachers, parents and learners because of political pressure. In Chapter 9, Louw de Beer zooms in on the HoD as a middle-level manager and how the formation of parallel-medium schools has created a new niche and exigency for leadership at this level in such parallel-medium schools. The study is based on observations, interviews and a documentary analysis of three parallel-medium schools in the Pretoria region.

In South Africa, as in the rest of the world, educators and other education leaders find themselves in a professional environment where one of their key points of reference, the curriculum, is subjected to frequent and major changes. In Chapter 10, titled 'Enablers of HoD curriculum leadership: Views from HoDs, principals and departmental officials', Tshepo T. Tapala reports on a literature study followed by his qualitative research. This comprises a qualitative, phenomenological approach within an interpretative paradigm using purposive sampling. Twelve HoDs and six principals from rural and urban

schools in the quintile one to three (Q1-Q3) and quintile four to five (Q4-Q5) categories and two departmental officials from two subdistricts were sampled. Data were collected using semi-structured, open-ended questions.

■ Conclusion

In the concluding chapter of the volume, an overarching view of key issues for the improvement of practice and future research will be provided, as these have emanated from the chapters in the book.

Scoping research on the teaching of education leadership

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■ Abstract

Education leadership is not only a rising field of scholarship, but the number of university programmes in education leadership is also rising. This chapter surveys and critically interrogates the corpus of literature on the teaching of education leadership at the university level. This chapter aims not only to take stock of the present corpus of knowledge but also to identify the desiderata for future research and, above all, to guide teachers in the field and in designing curricula for education leadership programmes. While there is, commendably, a constant stream of publications on education leadership training, there are a number of glaring desiderata as well. They are centred on the lack of studies on the outcome of education leadership programmes, what the stance and the handling of discontents in the effect of neoliberal economics on education leadership should be, the learning side of education leadership training and the lopsided corpus of literature skewed towards the Global North.

How to cite: Wolhuter, CC 2022, 'Scoping research on the teaching of education leadership', in L. van Jaarsveld, CC Wolhuter & CP van der Vyver (eds.), *Education Leadership: Scoping, perspectives and future trajectory*, AOSIS Books, Cape Town, pp. 13-25. <https://doi.org/10.4102/aosis.2022.BK383.02>

■ Introduction

In 2017, social science scholar and public media correspondent John Kane-Berman of the South African Institute of Race Relations conducted a study of 12 top-scoring schools in Gauteng. This set of schools included five no-fee township schools. All ten secondary schools had achieved Grade 12 pass rates of between 93% and 100% in the most recent (2016) round of Grade 12 examinations. In his lucid report, Kane-Berman (2017) identifies four key markers of success: (1) the presence of committed, competent principals, (2) hard-working teachers, (3) strong parental involvement and (4) an emphasis on discipline and instilling positive values in learners. This study on home turf again underscores leadership's value (the first key marker of success) in the education equation.

The extensive review of relevant research by Leithwood et al. (2004) concludes that leadership is an important factor in learner achievement in schools. The 2005 report on teachers of the Organisation of Economic Cooperation and Development (OECD) (2005) highlights teacher leadership's important role in today's realm. In Wales, recent reforms to improve the education system have also singled out leadership and leadership development as areas in need of attention (Reynolds & McKimm 2021). Not only is education leadership a rising field of scholarship, but the number of university programmes in education leadership is also rising. A case can be made that the future of the field of education leadership as a field of scholarship will be greatly affected (facilitated, steered or hampered) by the teaching of education leadership.

Furthermore, the improvement of the practice of education leadership – the rationale for the existence of the field – depends on the teaching of education leadership. In a recently published paper, Li, Poon and Lai (2021) found that middle leadership at the subject department level accounts for over 60% of the variation of the perceived student learning across the participating schools. Based on their findings, Li et al. argue that unleashing the full leadership potential of middle leaders is conducive to effecting change in schools. Moreover, underscoring the need for research on the education of education leadership, surveys and other research on education leadership, time and again, identify a need for leadership education as one of the factors hampering the emergence of exemplary, inspirational leadership. This transpired, for example, in recent research surveying principals of schools in New Zealand on their leadership in leading school communities to make contingency plans in the wake of the coronavirus disease 2019 (COVID-19) pandemic (cf. Thornton 2021). The same is evident from a recent study surveying the leadership roles of school principals and teachers in Queensland, Australia, in coming to terms with the COVID-19 pandemic (Simon 2021) and a study of teacher leadership in Spain

(Gratacós, Ladrón de Guevara & Rodriguez 2021). Thus, there is evidence of an appreciation of the importance of education in education leadership in various parts of the world. In the United States of America (USA), at least 34 bills providing school leaders' preparation, induction, mentoring and professional development were endorsed in 19 states between 2017-2020 (Pechota & Scott 2021). This says a great deal about how school education is regarded for some 15 000 school districts and where interference is made only in exceptional cases and highly important matters at the state or federal level.

The aim of this chapter is not only to take stock of the present corpus of knowledge of the teaching of education leadership, but also to identify the desiderata for future research and, above all, to guide teachers in teaching the field and designing curricula for education leadership programmes. The chapter commences with an explanation of the methodological basis of the chapter. The themes emanating from the literature survey are then tabled and discussed, forming the basis for assessing the corpus of literature on education leadership in the final section.

■ Research method

A search was conducted on the ERIC (Education Resources Information Center) database, sponsored by the Institute of Education Sciences of the United States Department of Education. The key phrase 'teaching education leadership' was submitted. This study was conducted from May to October 2021. The material thus found was studied. In the retrieved body of material, themes were identified. The literature is synthesised and discussed under these themes as rubrics.

A literature study critically appraises the current corpus of knowledge on a particular topic (Winchester & Salji 2016). The objective of a literature study, as in this chapter, according to Baron (2013) and Frink (2014), is to obtain a comprehensive review of the literature pertaining to the theme under investigation. Conducting a literature review is essential to developing a research idea to consolidate what is already known about a topic and to enable the researcher to identify any knowledge gaps and how the research can contribute to further understanding (Mashau & Ramabulana 2022).

Mashau and Ramabulana (2022) enumerate the significance of a literature survey in the development of research in a particular area under the following rubrics:

- It ensures that previously conducted research is not replicated.
- It reveals the most recent and authoritative theorising about the subject.
- It puts on the table the widely accepted empirical findings in the field of study.

- It assists in identifying available instrumentation with proven validity and reliability.
- It shows the accepted definitions of key concepts in the field.
- Suggestions as to what avenues to follow regarding future research emanate from it.
- It assists in determining whether the research or the research idea has merit, or it indicates if modification is needed and, if so, what kind.

■ Emanated themes

The following themes emanated from the literature study: the goals or objectives of teaching education leadership, content or competences and curriculum, and pedagogy or methods.

■ Objectives of and in teaching education leadership

On the objectives of and in teaching education leadership, much of the focus of publications pertains to the role of societal contextual factors, once again underscoring the patent impact of (societal and education system) contextual factors in leadership (cf. Wolhuter 2021b). Very prominent in this regard are issues of social justice, for example – understandable in view of recent events in the USA and beyond – the eradication of the dysconsciousness of racism (e.g. Waite 2021).

Further to that, the objectives of teaching education leadership are still being described in terms of the roles of education leaders, especially school principals (e.g. see Grigoropoulos 2020). Conventionally, from the time when the principal was seen as manager, the roles of the principal in terms of school management were enumerated as control, support, leadership and planning (cf. Mentz 2021). In line with the notion of the manager having been supplanted by a leader-manager, the field of education management has been supplanted by education leadership. Education leadership scholar Dempster (2009) of Griffiths University, Australia, defines education leadership thus:

School leaders, understanding and accommodating the contexts in which they operate, mobilise and work with others to articulate and achieve shared intentions to enhance learning and the lives of learners. (p. 22)

Suppose this can be accepted as typical of the idea of education leadership harboured by scholars of education leadership. In that case, the role of ‘context’ is accorded status, and at that, the value of studying education leadership from the perspective of the scholarly field of comparative and international education is acknowledged. Moreover, this field of study and its perspective are accorded a place in teaching programmes of education leadership.

Tipsrirach, Thacha and Chusorn (2021) reveal the following roles or elements of education leadership – elements fitting well into the line of expectation created by the definition of education leadership of Dempster (2009):

- **Key element 1:** Having vision. **Subelements:** Being optimistic, communicating effectively, taking risks and leading towards excellence.
- **Key element 2:** Communication skills. **Subelements:** Being a good listener, communicating clearly and motivating others.
- **Key element 3:** Inspiration. **Subelements:** Being a visionary, being reliable and empowering others.
- **Key element 4:** Commitment. **Subelements:** Focusing on the goal, being loyal and having a positive attitude.

To these roles of education leaders, some scholars wish to add new roles bestowed on education leaders by the social, economic and political context of a globalised world (Poliakova et al. 2021). These new demands or roles include lateral thinking, assuming leadership for the moral growth of all stakeholders involved in the education institution, offering personality-growth trajectories for learners, continuous self-improvement and professional learning and leading the training of educators in the newest pedagogical technologies. Buskila and Chen-Levi's (2021) empirical research in Israel found that principals should have emotional intelligence and put it to use to, inter alia, promote the well-being of teachers at the schools they are leading.

■ Selection of students for education leadership courses

On this part of teaching education leadership, there is a dearth of literature (Stone-Johnson, Gray & Wright 2021). Of the existing literature, issues of social justice and equity are a focal point. Stone-Johnson et al. report that (in the USA, at least) scant attention, if any, is given to these issues when candidates for education leadership training programmes are selected. Surveying potential candidates in an urban school district in the USA, they further found that the candidates' knowledge and views of and sensitivity to social justice issues and equity left much to be desired.

■ Curriculum of and competencies to be cultivated in education leadership programmes

The mode of treating the objectives of education leadership training, namely that of atomising it to fit around the roles of the school principal, is echoed in discussions on the curriculum of education leadership programmes. These, too, tend to be discussed around particular competencies to be cultivated.

The impact of neoliberal economics – that is, performance orientation – is evident. Reynolds and McKimm (2021) report on how recently developed policy guidelines on education leadership training in Wales have highlighted that best practices regarding leadership should be identified and taken over from exemplary schools. Performance orientation may also explain the value attached to leadership for classroom pedagogies in education leadership training discourse (e.g. see Reynolds & McKimm 2021) and leading and mentoring teacher professional development in this regard (Owen & Wong 2021; Pechota & Scott 2021).

On classroom pedagogies and leading teachers, Fuentes and Jimerson's (2020) research found that principals regarded education leadership content knowledge (i.e. apart from subject pedagogical knowledge) as useful to guide teachers. The testing regime is another aspect of the impact of the neoliberal economic revolution on education. In view of the rising importance of testing and the use of test results as an index of the quality of a school (and, by implication, of school leadership), Pogrow (2020) argues for the inclusion of a course on quantitative research methods in education leadership programmes.

Gian and Bao (2021) draw attention to the need to include in programmes of education leadership the development of the competence of school principals and the managing staff to steer and lead effective innovation in schools. In view of the constant downscaling of governmental financial support, even for public schools, Miller, Lu and Gearhart (2020) advocate for the inclusion of training in fundraising in education leadership training programmes. Other publications (e.g. Buskila & Chen-Levi 2021) highlight the role of the principal in managing or supporting the well-being of teachers.

Acknowledgement of the salience of context is evident; that is, leaders should be trained to be sensitive to contextual imperatives emanating from the specificities of the community in which their schools are located and choose or adapt their leadership strategies accordingly (Reynolds & McKimm 2021). Issues surrounding social justice also enjoy attention in studies on the content of education leadership programmes, for example, cultural sensitivity and responsiveness, including the rising phenomenon of hybrid and mixed-racial identities (Guillaume & Christman 2020) and combating racism and 'anti-blackness' (Waite 2021).

The outbreak of the COVID-19 pandemic has severely disrupted education systems worldwide, and bringing new challenges to education leadership in institutions and classrooms. This new context or situation has also had an impact on the research agenda of the teaching of education leadership, resulting in publications on the teaching of adaptive leadership for unexpected disasters in general (e.g. Potter, Pavlakis & Kessa 2021) and for the COVID-19 pandemic in particular (e.g. Bagwell 2020).

■ Pedagogy or method of teaching and learning

Harvey and Jones (2021) advocate for the development of leadership capacity by means of action research – in particular, scholarship of learning and teaching. Linked to the emphasis on issues of social justice pointed out in the content section earlier, especially racism and race bias, Williams (2021) reports on a study in which animal-assisted interventions, specifically horses, in an educational setting were used to make students in education leadership programmes become aware of and to examine their own views, beliefs and biases.

The call for interactive and learner-centred teaching has also reached the realm of education leadership training. Jones, Ransom and Chambers (2020) demonstrate the teaching of ethics in leadership using the values–issues–interaction model. Dexter et al. (2020) provide an overview of digital tools that can be used for interactive teaching of education leadership.

In an age in which societal contextual factors are exerting a force for education programmes to go more and more online, research has been published on how to use information and communication technology to the advantage of education leadership training. Norsworthy and Herndon (2020) explain how a student-produced podcast can be utilised as an educational tool to showcase leadership and ethics. It illustrates how podcasting provides a unique pedagogical device for students to engage with leadership issues in an accessible, practical and relevant way. Yu and Campbell (2021) report on the use of television shows for leadership education. In 73 shows, 89 leadership scenarios were identified which were used to give a practical demonstration of leadership models and theories and to teach leadership skills. Volante et al. (2020) report on an education leadership programme where digital technology was used to simulate six real-life situations of school principals and how it was used as a training device to teach students how to make decisions.

Pogrebinskaya et al. (2021) point out that information and communication technology presents an imperative opportunity for both the content and the pedagogy of education leadership training. Mobile technologies make the quick collection and capture of information possible. Pogrebinskaya et al. report on a study in which mobile technology was used as a tool in education leadership teaching and learning, simultaneously acquainting and making students comfortable with the use of mobile technologies in exercising leadership roles.

Pannell and Sergi-McBrayer (2020) report on a pilot study with a set of students in a principal education leadership programme, investigating the effect of a year-long full-time internship versus candidates remaining in their teaching posts while doing part-time practicums. As measured by the final grades in the state certification examinations, those who went the internship way performed significantly better. The value of hands-on practical experience,

including assignments linked to the practical experience, as part of the training programme for leadership also comes to the fore in the publication of Coleman et al. (2021).

André (2020) reports on a method of leadership education that he describes as 'integrative learning', in which practice plays a strong part in making theory visible. The theory underpinning the leadership training course is grounded in the notion of sustainability (in the sense of sustainable development and the SDGs). The article includes the objectives of learning, assignments, media and readings used and curriculum.

□ Assessment of and critical reflection on research on education leadership training

The above survey gives the impression of an active research community studying the teaching of education leadership and focusing on a range of topics. Although impressive, a number of desiderata can be identified.

While several studies demonstrate the effect of leadership training, such as Berkovitch and Eyal's (2020) publication on empirical research on the outcome of leadership education on six cohorts of students in Israel, there is a need for precise or fine-grained tracer studies. These should trace the professional paths of alums, how they draw on their training to inform their leadership, and what can be learnt from improving education leadership training. In recent years, within the scholarly field of higher education, tracer studies have risen to a robust and proven research focus (e.g. see Badiru & Wahome 2016 Kalaw 2019; Millington 2008; Teichler 1998, 1999, 2000, 2011). These include tracer studies conducted to improve programmes delivered at higher education institutions. Nadzor and Ansah (2020) report on a large-scale tracer study on higher education in Ghana using individual interviews and focus group discussions. In 2016, the World Bank conducted a nationwide tracer study of vocational and higher education graduates in the former Yugoslav Republic of Macedonia (Mojsoska-Blazevski 2017). The Commission on Higher Education (2017) developed a graduate tracer survey questionnaire (Dimaculangan 2017). With this proven niche for tracer studies in many other fields, it can be postulated that there is a need for similar tracer studies of graduates of education leadership programmes. Such tracer studies on alums of education leadership programmes, tracing and probing the career paths and experiences of programmes by such alums, can significantly contribute to assessing these programmes' value and providing feedback for improving them. The graduate tracer survey of the Commission on Higher Education can be adapted to tailor it for tracer studies of education leadership programmes.

This time in history is characterised by, *inter alia*:

- **Democratisation:** one of the world's signature features since 1990 (cf. Wolhuter 2018).

- **Individualism:** the causes of both democratisation and individualism can be traced back to, amongst other things, the rise of the creed of human rights as the moral code of a globalised world and the empowerment of the individual brought about by the information and communication technology revolution.
- **Consumerism:** the neoliberal economic revolution.

Therefore, it has become appropriate or even essential to probe the experience and lived experience of students when assessing the outcomes of education leadership training of principals and teachers. In school management and school leadership, there is a voluminous amount of literature on organisational culture in education settings and the dividends the organisation climate has on school effectiveness, school well-being and other aspects of the school, such as learner discipline (cf. Van der Westhuizen, Oosthuizen & Wolhuter 2008; Wolhuter & Van der Walt 2018; Wolhuter, Van Jaarsveld & Challens 2018). The creation of a congenial organisation culture requires taking students on board. On the subject of learner discipline at schools – a problem schools, teachers and principals are facing worldwide – the much-acclaimed model of establishing sound learner discipline, developed by Malcolm Lovegrove and colleagues in Australia, rests greatly on involving learners (cf. Lovegrove, Lewis & Burman 1989; Wolhuter & Steyn 2003). In the corpus of literature on the teaching of education leadership, this facet of training for the creation and maintenance of a sound organisation culture is not salient. Then, on this point, it should also be mentioned that while in the literature on the teaching of education leadership, the principal is prominent and the teacher less so, what is absent is the training of student leadership.

Then there is the next major constituency in the education enterprise, namely the teacher corps. Results of studies such as the International Teaching and Learning Survey (TALIS), conducted at regular intervals by the OECD in many countries, point to all but a satisfying profession (Ceylan & Özdoğan Özbal 2020; Sims 2017). Sims and Jerrim's (2020) factor analysis on the database of the most recent round of TALIS surveys in 2018 identified leadership as one factor underlying teachers' professional or job satisfaction. With TALIS data already being used for research conducted on the education or professional development of teachers as an independent variable in their professional functioning (e.g. Liu & Liao 2019) and to identify the professional training needs of teachers (e.g. Zhang, Shi & Lin 2020), the TALIS results should also be interpreted in terms of (1) how these data point to needs in the training of education leaders and (2) how the questionnaire can be used as a post-test to assess the efficacy (for lack of a better word) of education leadership training programmes.

Another major constituency in the professional sociogram of the education leader is the parental community. Parental involvement or the parental factor in school education is a pivotal aspect of school success (cf. the remarks of

Kane-Berman; cf. also Stewart 2008; Wolhuter & Van der Walt 2020) too often neglected in research on education as a whole and education leadership in general, and it does not figure in research on training programmes for education leaders. What is important is parental involvement in school matters and the parental or home environment (parenting styles of raising children, richness of the family environment in stimulating children and the example set by parents) (Wolhuter & Van der Walt 2020). It is heartening that one of the top-tier journals in the field of comparative and international education, *Comparative Education*, has recently (2020) devoted a special issue to the theme of parents, schools and the 21st-century state. As in the case of teachers, sensitivity to the parental factor and ways to connect to parents should be incorporated into education leadership training programmes. In a country such as South Africa, where 60% of children do not know the identity of their biological fathers (cf. Jansen 2021), let alone foster a healthy relationship with their parents, this adequate situational response about the parental factor is crucial in education leadership. The parental factor is thus also, by implication, vital in training for education leadership.

The next constituency to be considered when conducting a wide-angled or holistic assessment and planning of education leadership training programmes is the community. In his address to the Cape Professional Teachers Association 1978 annual conference in Upington, Dr Franklin Sonn gave the following statement, which has since then become known in some circles as the 'Franklin Sonn oath of the professional teacher' (Wyngaard 2020):

We are not merely mindless members of the broad community. By virtue of our profession, we have a clear vocation to render service, to offer leadership, and to see to it that vision without which no nation can prosper, is not diminished or destroyed. (p. 18)

The 2000 version of the Norms and Standards for Teacher Education in South Africa expressly enunciates the role of the teacher as a community leader (Republic of South Africa 2000):

Community, citizenship and pastoral role. The educator will practise and promote a critical, committed and ethical attitude towards developing a sense of respect and responsibility towards others. The educator will uphold the constitution and promote democratic values and practices in schools and society. Within the school, the educator will demonstrate an ability to develop a supportive and empowering environment for the learner and respond to the educational and other needs of learners and fellow educators. Furthermore, the educator will develop supportive relations with parents and other key persons and organisations based on a critical understanding of community and environmental development issue. (p. 4)

What is not always appreciated, as it is not adequately reflected in the northern hemispheric-dominated literature on education leadership, is that in the context of much of the Global South the teacher, and especially the principal, is often the most highly educated person in a community or village and is looked upon as a special role in serving as a leader on a very wide

front (financial advisor, political advisor, spiritual advisor, etc.) (cf. Betancur-Mejia 1969).

One of the points of criticism often levelled against the teaching profession in the current age of the neoliberal economic revolution, which brought the principles of this revolution into education too,¹ is that it has denuded the professional freedom of the teacher to virtually zero. Such over-prescriptiveness has a stifling or choking effect on the teacher, apart from being at variance with one of the defining features of a profession as entailing non-stereotypical work, where the person practising the profession has the freedom to use his or her expertise or professional judgement to address each case or instance coming before him or her. This glaring discrepancy raises a number of serious questions regarding leadership training, none of which is addressed in the literature on educational leadership training. The first point is that just as the teacher is subjected to a work situation, not unlike Foucault's panopticon (cf. Potgieter, Van der Walt & Wolhuter 2016), principals are similarly caught in a strangling web of managerialism and excessive prescriptiveness, reducing their freedom to take the initiative and express individuality. This devastates any chance of creativity, originality or the capacity to act promptly to new situations and opportunities. The following questions arise: how far should education leadership programmes be structured to force education leaders (principals and teachers) into a straitjacket? How much should these programmes make provision for developing individual talents and exercising individual professional freedom?

A diverse assortment of definitions of leadership exists. Helmrich (2015) lists 30 different definitions of leadership that emerged when the newspaper *Business News Daily* probed business and public leaders on this concept. Similarly, a wide range of theories on leadership can be found. The main categories of leadership definitions are the great man theories, trait theories, behavioural theories and transaction theories (Wolhuter 2021a). Regarding trait theories, despite attempts to develop an exhaustive list of distinguishing leadership traits, such a list could hitherto not have been produced (Wolhuter 2021a). Personality trait theories also say nothing about the role of context – in this chapter, the roles of context and of that which takes place beyond the perimeter of the school fence are highlighted. In the literature survey, the entire conceptualisation of what leadership is and on which any leadership training programme is predicated remains unstated and unexamined. Furthermore, it will be an interesting exercise to use studies on the outcome and impact of leadership training programmes – when such studies begin to appear on the agenda of research on education leadership training – to critically examine and cast light on attempts to define or clarify the concept of education leadership.

1. That is, an obsession with performance measurement, efficiency, the profit motive and over-managerialism.

While a complete definition capturing the essence of leadership remains elusive, it can surely be stated that two indispensable elements of leadership are inspiration and being visionary – inspiring, visionary leadership sounds good, but at the same time, it sounds almost like a tautology. While research on the inspirational sources for student teachers has been conducted (see Wolhuter et al. 2012), research on sources and levels of inspiration for serving teachers is scarce (see Wolhuter et al. 2012), more so research on how well the leadership of schools is inspiring teachers. This, too, is an aspect that can be brought into the scope of the much-needed research on the output or impact, in practice, of education leadership training programmes. The same can be stated with regard to the visionary element of leadership. The operationalisation and measurement of both inspiration and visionary leadership in education leadership and how to teach these are indeed a tall order but would add significant value to the corpus of knowledge on education leadership training.

Much has been stated in this chapter and elsewhere (see Wolhuter 2021b) regarding the impact or role of (the societal and education system) context in exercising school leadership. Currently, in the field of scholarship engaging itself with the investigation of education systems and their interrelatedness with the societal contexts in which these systems are embedded, that is, comparative and international education, four narratives can be identified (Wolhuter et al. 2022). These four narratives run in the public discourse on education and can also be described as the four driving forces of the global education expansion and reform project taking place at this point in history. These four narratives are the capabilities narrative, the neoliberal economic narrative, the human rights narrative and the social justice narrative (Wolhuter et al. 2022). Human rights, neoliberal economics, and social justice have been under discussion earlier in this chapter, either as part of the literature on the teaching of education leadership or as part of the critique on the current state of research on the teaching of education leadership.

The focus will now turn to the capabilities theory and the capabilities narrative in the public and scholarly discourse on education and the relevance thereof for teaching education leadership. As explained by Sen (1999), Nussbaum (2000) and others, the philosophy of human capabilities regards human beings as having huge potential or capabilities. This narrative argues that conditions should be created so that these capabilities can be realised. Education should also be structured to be conducive for every student's capabilities to flourish. A central idea is that of individual self-actualisation or individual excellence. Creativity and creating space for creativity to blossom are also highly regarded. In view of the importance of these in the new kind of education required by the exigencies of the 21st century, it may well be worth investigating what the capabilities narrative has to offer for programmes of education leadership training.

Two final desiderata in the corpus of literature on education leadership training pertain to the learning theory and the dominance of the Global North. In the recent past, the emphasis of especially the scholarly discourse on pedagogy, as well as the public discourse, has shifted from teaching to learning. The learning flipside of the teaching-learning dyad in education leadership programmes does not figure in the above survey of publications on education leadership training. Finally, at a time when the dominance of the Global North in the world of scholarly publishing is very topical (e.g. see Inamdar & Kirloskar 2021), the survey of the literature on education leadership programmes reveals a very lopsided structure (in terms of both the terrain of study and authorship) favouring the Global North that asks for rectification.

■ Conclusion

Without education leadership training, the entire scholarly field of educational leadership is, at best, of very limited practical value. It is heartening that a constant stream of publications on education leadership training sees the light of day. However, there are a number of glaring desiderata as well. These involve the lack of studies on the outcome of education leadership programmes, what the stance and the handling of discontents in the effect of neoliberal economics on education leadership should be, the learning side of education leadership training and the lopsided corpus of literature skewed towards the Global North.

Part 2

Teacher leadership

Collective teacher efficacy in high-performing high schools in South Africa

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■ Abstract

Collective teacher efficacy is a compelling predictor of academic performance, even when socio-economic status, race and gender are considered. This holds promise for continuous school improvement, which is encouraging to South African school leaders who have to improve the academic performance of their schools amidst systemic and structural challenges. A quantitative study was conducted with the participation of ten randomly selected high-performing schools. The study was grounded in social cognitive theory, and the findings revealed that collective teacher efficacy in the selected schools is high for group competence and task analysis. The perceived collective teacher efficacy of the

How to cite: Challens, BH & Mosoge, MJ 2022, 'Collective Teacher Efficacy in High-Performing High Schools in South Africa', in L van Jaarsveld, CC Wolhuter & CP van der Vyver (eds.), *Education Leadership: Scoping, perspectives and future trajectory*, AOSIS Books, Cape Town, pp. 29–47. <https://doi.org/10.4102/aosis.2022.BK383.03>

teachers in these schools signifies that the teachers have confidence in the performance capabilities of their colleagues and their ability to positively influence the achievement of their learners and deal with disciplinary problems.

■ Introduction

In South Africa, as in many other countries, school effectiveness is determined by learners' academic achievement, which is often based on the results of learners in their final school-leaving examinations. Although a growing number of relatively poorly resourced, formerly disadvantaged schools in the country are performing at the required level, most of the top schools in the country are privileged institutions. One of the things that are of great interest to researchers and educationists is to identify those factors present in high-performing schools that can be transferred to and implemented in low-performing schools to improve learner achievement. A promising factor that seems to be present in high-performing schools is collective efficacy, which is the belief amongst group members that they possess the competence to shape and perform the necessary action to attain vital goals (Goddard, Skrla & Salloum 2017). The collective efficacy of teachers in both previously advantaged and disadvantaged high-performing schools was examined to compare the effect of low-performing schools.

In South Africa, public schools are measured using an instrument called WSE. This instrument measures the effectiveness of the whole school with learner-academic-achievement being one of the criteria (Naidu et al. 2016; Van Deventer 2016). The focus of WSE is not on the individual teacher per se but on the school as a whole (collectively). In line with WSE, collective teacher efficacy (CTE) is a construct that measures the combined perceptions of all the teachers in the school as a whole. The grade and phase exit results in South Africa also focus on the school's performance as a whole. Schools' academic performance is not based on the academic performance of only one learner but on the collective performance of all the learners in the school. Collective teacher efficacy looks at the unit (school) and not individuals, making it a useful construct in the South African context. The work done on CTE holds promise for continuous school improvement, predominantly in schools with risk factors (Bieneman 2012). This view echoes the findings of Brinson and Steiner (2007), who submit that CTE remains a compelling predictor of academic performance, even considering socio-economic status, race and gender. Moreover, other research findings have revealed that CTE is more significant for the growth of learner-academic-achievement than the community in which learners live and their household income (Donohoo, Hattie & Eells 2018). Collective teacher efficacy influences learner achievement positively because greater efficacy drives vital behaviours that are key to quality implementation (Donohoo & Katz 2019). This is encouraging for South African school leaders who must improve the academic performance of

their schools amidst socio-economic and cultural challenges. Furthermore, parents are attracted to sending their children to schools that perform well (Goldring & Phillips 2008; Ndimande 2006).

Teachers may affect learners and their achievements differently. Identifying school characteristics related to the dissimilarities in learner performance is key to creating effective schools (Goddard, Hoy & Hoy 2000). A few teacher characteristics consistently predict learner achievement, even after controlling for socio-economic factors. Hoy, Tarter and Hoy (2006) identified three organisational properties that seem to make a difference in learner achievement, namely the school's academic emphasis, the teachers' collective efficacy and the teachers' trust in parents and learners. Several researchers connected CTE with enhanced learner attainment (e.g. Cheung 2008; Donohoo et al. 2018; Donohoo & Katz 2019; Goddard et al. 2000, 2015; Klaasen et al. 2011; Tschannen-Moran & Barr 2004; Yeo et al. 2008). Goddard et al. (2017:229) also found that collective efficacy seems to 'promote achievement for all learners while simultaneously mitigating the achievement gap for black learners'. This important finding supports the improved link of CTE with learner-academic-achievement. It indicates that the learners' race does not limit CTE, which is encouraging within the South African context of previously-disadvantaged schools that still performs their duties below the required standard. Moreover, the perceived CTE is a strong, encouraging forecast of the differences between schools in relation to learner achievement (Donohoo et al. 2020). The focus of the research below has been on determining the level of CTE in high-performing town and township high schools in South Africa to verify and establish a possible link with the learners' academic performance in these schools. The results of this study can be used to improve learner performance in low-performing schools. Before reporting on the empirical investigation that has been conducted, the conceptual and theoretical framework regarding CTE, some encouraging research findings on CTE and the key role of the school principal in fostering CTE are discussed.

■ Aim of the research

Collective teacher efficacy, or CTE, is a fairly current study area in the discipline of education compared to teacher efficacy. However, it has attracted substantial attention because of the encouraging and important research findings concerning this topic (Donohoo 2018; Zhou 2019). The literature reveals that little research has been conducted on CTE in South Africa. More studies have been conducted on teacher efficacy than on CTE (Donohoo 2018; Klaasen et al. 2011). Research on CTE is even more scanty in developing countries, as the most of the studies in South Africa (e.g. Rangraje et al. 2005), Kenya (e.g. Onderi & Croll 2009) and Singapore (e.g. Yeo et al. 2008) focus on teacher efficacy instead of CTE. The study by Mosoge, Challens and Xaba (2018) deals with CTE in low-performing schools in South Africa.

The current study, conducted in a developing country and focusing on high-performing schools, will add to the literature on the topic. This research aimed to investigate the state of CTE in high-performing high schools in South Africa and to establish how the findings of the study could benefit low-performing schools and the body of knowledge.

■ Conceptual and theoretical framework

■ Self-efficacy and teacher efficacy

Bandura (1997) claims that efficacy beliefs are key elements of behavioural change for individuals, organisations and nations. He describes self-efficacy as a person's 'belief in their capacity' to perform in such a way as to reach the required level of attainment. By managing levels of talent and opportunity, self-efficacy beliefs have been proven to substantially benefit in attaining success in various contexts, including school, sport, work and health (Caprara et al. 2003). This is in line with the contention of Tschannen-Moran, Hoy and Hoy (1998) that self-efficacy is context-specific, subject to task or situation.

Teacher efficacy can be defined as a teacher's belief in influencing learner-academic-achievement (Cheung 2008; Erawan 2010; Yeo et al. 2008). It can be conceptualised as the belief or conviction of teachers 'that they can influence how well learners learn, even those who may be difficult or unmotivated' (Tschannen-Moran & Barr 2004:189-190). Self-efficacious teachers are more likely to plan suitable activities, are more persistent when it comes to learners who experience difficulties and spend extensive effort on finding suitable teaching materials. Moreover, teachers with high levels of self-efficacy are better positioned to overcome circumstances that challenge their teaching capability, are inclined to be more optimistic, put greater effort into their jobs and take personal responsibility for their failures and successes (Ware & Kitsantas 2007).

■ Collective teacher efficacy

To have a complete understanding of the normative impact of CTE, one must realise that 'schools, and the beliefs that characterise their cultures, provide complex and influential social environments' for their learners and staff (Goddard et al. 2017:222). Teachers have perceptions not only of their own efficacy but also of the conjoint capability of the school staff as a whole. Perceived collective efficacy signifies the beliefs of the members of a group regarding 'the performance capability of a social system as a whole' (Bandura 1997:469). Collective teacher efficacy refers to the perception of teachers that their shared labours will have a helpful impact on learners, including those who are disconnected, uninterested or deprived (Bieneman 2012; Donohoo 2018; Goddard, Hoy & Hoy 2004a). It is the belief of teachers in a school that

they can jointly influence their learners' education (positively affecting learner achievement) beyond the educational impression on their households and neighbourhoods (Goddard et al. 2000; Schechter & Tschannen-Moran 2006). Tschannen-Moran and Barr (2004) describe it as the 'collective self-perception that teachers in a given school make an educational difference to their learners over and above the educational impact of their homes and communities'. Donohoo and Katz (2019:25) describe collective efficacy as 'a critical belief system for improving learner outcomes'. Perceptions of CTE help to impact the behaviour of people and groups by affording and encouraging outlooks for action and restraining unsuitable action (Sampson, Morenoff & Earls 1999). Collective teacher efficacy involves attributes of cohesiveness, which entail group judgement and effort, with persistence and willingness for a group to continue together (Ware & Kitsantas 2007).

■ Four sources of efficacy

Bandura (1977) and Goddard et al. (2004a) claim that there are four sources of efficacy that are essential for forming CTE. These four sources are mastery experience, vicarious experience, verbal persuasion and the affective or emotional state.

■ Mastery experience

Mastery experience is regarded as the most significant source for creating collective efficacy. The previous success of a school increases the perceived collective efficacy of the teachers when they link the success with the efforts of the collective, while previous failures tend to lead to a drop in teachers' beliefs (Donohoo 2017; Zhou 2019). Attributions are also considered to be vital, as success or failure can be attributed to collective effort or other factors. The argument is that if success is attributed to the efforts of the group, it will lead to enhanced collective efficacy. On the other hand, when such success is attributed to luck or uncontrollable factors, it will lead to lower perceived collective efficacy. When success becomes consistent and part of the normal experience, failure tends to lead to discouragement (Zhou 2019). Goddard et al. (2000:484) allege that 'a resilient sense of collective efficacy probably requires experience in overcoming difficulties through persistent effort'. Goddard (2001:474) found that collective efficacy was a noteworthy, confident predictor of the differences between schools. In addition, 'when mastery experience was considered, school-level [socio-economic status] and race were no longer statistically significant predictors of differences amongst schools in collective efficacy'. Mastery experiences demonstrate to high-powered teams that they can collectively achieve great things. When school teams perceive that their efforts are fruitful, they start to grow their confidence in one another and drive one another to do even better (Donohoo & Katz 2019).

■ Vicarious experience

Vicarious experience is also referred to as ‘models of success’. It is common for schools to learn from the successes of others and then try to replicate them to attain similar results. In the same way, CTE can be enhanced by learning from the successes of other schools with similar contexts (Becker 2017; Zhou 2019).

■ Verbal persuasion

Verbal persuasion may enhance teachers’ beliefs that they can achieve their set goals. This approach includes social interaction such as workshops, professional development, staff meetings and teacher conversations in the staff room and along the corridors. Although verbal persuasion alone may not produce significant school changes, combined with vicarious experience, it tends to produce influential collective teacher beliefs (Zhou 2019). Verbal persuasion is also seen as the feedback people receive. Becker (2017) states that teachers’ efficacy is enhanced when they receive valuable feedback from credible people. New teachers who join schools with firm collective beliefs easily adapt to the school activities and conduct because of their interaction with their fellow teachers and other staff members (Zhou 2019).

■ Affective (emotional) state

Like individuals, schools handle encounters differently. Goddard et al. (2004a:6) are of the opinion that ‘affective states may influence how organisations interpret and react to the myriad challenges they face’. Schools with solid confidence in collective competence tend to upsurge the challenge and have a superior acceptance of calamities and difficulties. On the other hand, schools with lower efficacy levels are likely to overreact in challenging circumstances (Zhou 2019).

■ Encouraging contributions of collective teacher efficacy

Hoy et al. (2006) found positive relations between learner attainment and three efficacy beliefs, namely, self-efficacy beliefs of learners, self-efficacy of teachers and teachers’ collective efficacy beliefs about the school. This chapter focuses on the collective efficacy of teachers and learner achievement because collective efficacy is a school property amendable to change (cf. Hoy et al. 2006).

In a study by Donohoo (2018), the productive behaviour that results from collective efficacy and other consequences that flow from CTE were examined. Donohoo examined 34 peer-reviewed articles that had been published in

English since 2000. These studies showed that CTE ‘not only influenced productive teaching behaviours, but also resulted in more positive affective states’ (Donohoo 2018:339). The study further revealed that CTE resulted in better implementation of ‘school improvement strategies, increased teacher leadership, high expectations and a strong focus on academic pursuits, greater risk-taking, and a receptiveness to new ideas on the part of educators’ (Donohoo 2018:339). Where efficacy existed, the study also found a greater commitment of teachers to their learners and a lower incidence of learner suspension or removal from class because of their misbehaviour. The teachers at these schools also exhibited a greater likelihood of remaining at the school and in the teaching profession. Collective teacher efficacy was also found to be a predictor of optimistic sentiments and viewpoints. Only one of the studies Donohoo reviewed linked CTE with lower stress and higher job satisfaction. In schools where collective efficacy was high, the teachers reacted with greater optimism to learners with special needs and to professional development. Collective teacher efficacy has a positive correlation with learners’ emotional engagement and a negative correlation with performance goal orientations. The review of the studies also found that teacher leadership was more dominant in schools where the teachers had a sense of collective efficacy (Donohoo 2018), advocating for the fostering of greater CTE in schools.

The findings from the review conducted by Donohoo (2018) revealed an important link between teachers’ expectations and CTE. In a meta-analysis conducted by Hattie (in Donohoo 2018), it was found that teachers’ expectations had a significant influence on successful learner achievement. ‘Teachers with high expectations convey to students that teachers believe they can attain high levels of performance based on challenging and appropriate goals’ (Donohoo 2018:340). However, when teachers hold low expectations for their learners, they do so for the whole class (Rubie-Davis et al. in Donohoo 2018).

Collective teacher efficacy displays a negative correlation with teacher turnover or teachers’ intention to leave a job or the profession (Qadach, Schechter & Da’as 2020). This echoes the finding that CTE is significant in predicting future behaviour (Geijsel et al. 2003) and is a key mediator of stressors on burnout and job satisfaction (Fernet, Chanal & Guay 2017; Skaalvik & Skaalvik 2014). Growth in CTE beliefs leads to a decline in the correlation between professional burnout and job satisfaction, as well as between professional burnout and life satisfaction (Aydoğmuş & Serçe 2021). People who suffer burnout feel exhausted and emotionally drained. Collective efficacy is described as confidence in the shared abilities of the teachers in a school. ‘If this belief is high, the perception of job satisfaction and satisfaction with life is high, and the perception of burnout is expected to be low’ (Aydoğmuş & Serçe 2021:244). One may argue that an increase in the perception echelons of teachers concerning their life satisfaction and job satisfaction will lead to a

drop in their perception echelons of burnout. In addition, Jhanke (in Aydoğmuş & Serçe 2021:244) lists the following as some of the factors that have an impact on the enhancement of collective efficacy: 'a positive and supportive environment, a clear and apparent vision and objectives, high expectations, meaningful professional development and shared leadership'.

■ The role of school leadership in fostering collective teacher efficacy

School principals are deemed the accounting officers of their schools. Over the past few decades, principal leadership has reliably emerged as a powerful force to influence change and school effectiveness (Qadach et al. 2020). Principals undertake the improvement of learner achievement as part of their primary responsibilities. As the heads of their schools, they can affect learner achievement through CTE (Ross & Gray 2006), and the ability of the principal 'to behave in ways that build relationships may enhance and develop CTE' (Pierce 2019:22). School principals find themselves in a position suitable for improving the school structure to have a stimulating impact on CTE. In doing so, they can create a turnaround on factors that may harm teachers' beliefs about improving learner achievement (Nordick, Putney & Jones 2019).

Schools originated as bureaucratic and authoritarian institutions that hamper the potential of teachers to be active agents of change. Teachers tend to have firmer beliefs in the competence of their schools when they are afforded the chance to influence school decisions (Nordick et al. 2019). Through constant support, communication, affirmation, joint decision-making and sharing responsibilities, teacher leaders are empowered, and healthy school environments are cultivated (Derrington & Angelle 2013). Research has found a link between teachers' opportunities to influence school decisions and perceived CTE (Goddard et al. 2004b). School principals are vital suppliers of the enrichment of collective efficacy in their schools (Bandura 1995; Goddard 2001; Nordick et al. 2019; Ross & Gray 2006; Tschannen-Moran & Barr 2004).

One way for education departments and schools to implement a positive change process is by building a collective sense of efficacy. It is believed that successful change relies on a change in teachers (Zhang 2016). Collective teacher efficacy relies on shared responsibilities for learner learning and school achievement (Goddard & Goddard, cited in Angelle & Teague 2014). Teachers with robust collective efficacy can add to the scope of school leadership by sharing information with their peers and taking on formal and informal leadership responsibilities within the school (Angelle & Teague 2014). Lui (2019) found that thoughtful collaboration, clear responsibilities and fruitful communication of beliefs and values contributed positively to CTE.

Furthermore, Goddard et al. (2015) explored the relationship between principal leadership, teacher collaboration, collective efficacy and learner achievement. They found that both teacher collaboration and CTE were strongly projected by the principal's instructional leadership. Strong teacher leadership is clear when teacher leaders trust they have the ability to effect change, an urge to labour for the desired change and the information and abilities to execute it (Derrington & Angelle 2013). The school principal, as the instructional leader, becomes the primary influencer of teacher collaboration and CTE within the school (Nordick et al. 2019). Teacher leaders can have a profound impact on learner achievement and foster a collaborative and healthy school culture through their influence (Derrington & Angelle 2013). They serve as excellent role models not only to their learners but to their colleagues as well. Teacher collaboration consequently has the potential to lift teachers' morale and leads to greater work commitment (Derrington & Angelle 2013). Research advocates that solid instructional leaders create a shared vision, shape the school culture, establish a positive instructional climate, advance CTE and participate in teaching and learning matters with the rest of the teachers (Hallinger & Wang 2015; Heck & Hallinger 2014; May & Supovitz 2011; Qadach et al. 2020).

Research portrays a relationship between instructional leadership and CTE (Aydoğmuş & Serçe 2021). The instructional leadership of principals supports teacher collaboration to enhance instruction, which may add to school effectiveness by bracing CTE beliefs (Donohoo et al. 2020; Goddard et al. 2015). Principals impact on teaching practice and set high standards, which aid CTE beliefs (Ross & Gray 2006). The principal's instructional leadership influences teachers' self-efficacy, so they view themselves as competent to teach their learners and consequently put in greater effort (Qadach et al. 2020). Thus, instructional leaders play an important role in increasing teachers' self-efficacy and collective efficacy. Schools where the principals regularly monitor instruction and provide instructional solid guidance are the ones where the teachers work collectively to improve instruction (Donohoo et al. 2020). When teachers focus on instructional improvement in their collaboration in schools, it becomes more likely that they will also improve their abilities, enhancing their belief that they can meet their learners' educational goals. Thus, teacher collaboration for instructional improvement is a significant predictor of CTE (Donohoo et al. 2020).

Surprisingly, Lui (2019) also found an ineffective relationship between distributed leadership and CTE, suggesting that despite teachers' participation in decision-making, their opportunities to perform leadership roles remained limited. The limitation of these teachers to perform leadership roles harms their CTE beliefs, their group competence beliefs and their sense of task composition.

■ Social cognitive theory as a theoretical framework

For this investigation, collective efficacy has been anchored in the social cognitive theory and a derivative of Bandura's (1997) construct of self-efficacy. The central notion of the social cognitive theory comprises the selections that individuals and collectives make through the practice of human agency (Goddard et al. 2004a). The social cognitive theory postulates that the choices of people and organisations (through the actions of individuals) are influenced by the vigour of their efficacy beliefs (Goddard et al. 2004a).

Human agency, which defines people's ability to exert some influence over their lives, is a key element in understanding how groups function. The social cognitive theory concedes that 'personal agency operates within a broad network of socio-structural influences [...] [and] extends the analysis of mechanisms of human agency to the exercise of collective agency' (Bandura 1997:6). Moreover, the social cognitive theory regards people's joint conviction in their collective ability to deliver required results as a critical element of collective agency (Caprara et al. 2003; Sorlie & Torsheim 2011).

A crucial assumption of the social cognitive theory is the existence of organisational agency. Organisational agency is evident in the purposeful choices that a group makes, considering their perceptions of collective competence to achieve specific goals (Goddard, LoGerfo & Hoy 2004b:405). 'When individuals and collectives choose to work in pursuit of certain attainments, the actions reflect the exercise of agency' (Goddard et al. 2004a:5). Collective teacher efficacy is central to organisational agency, as groups are more prone to pursue goals they believe they can achieve resiliently. Teachers with a solid impression of CTE lead to high expectations that stimulate sustained efforts toward the goals of the school (Goddard et al. 2017). The extension of individual efficacy to collective efficacy is entrenched in the observation that individuals do not function in a vacuum as 'social isolates' but are impacted by the behaviours of the social group (Sorlie & Torsheim 2011). Teachers do not operate in isolation but collectively within an interactive social system to improve the quality of life (Bandura 2004; Bieneman 2012). Collective teacher efficacy is a significant predictor of the difference in learner achievement amongst schools (Parker, Hannah & Topping 2006). Bandura (in Hoy, Sweetland & Smith 2002) was the first to proclaim that collective efficacy is an influential concept that fluctuates considerably between schools and is systematically linked to learner achievement in a school.

This study presents insight into CTE in a developing country, thus contributing to the literature on this topic and presenting prospects for comparison with research conducted internationally. The following section deals with issues related to the empirical investigation.

■ Empirical investigation

■ Research design

The researchers applied a quantitative survey design to examine teachers' collective efficacy beliefs. This design was chosen because the researchers aimed to capture the difference in teachers' collective efficacy in similar yet different school contexts and because the literature on this topic is still scanty in South Africa. A literature search delivered only six qualitative studies investigating CTE. An overview of the state of CTE was therefore considered to be fitting as an initial step towards possible prospects for further research. The aim of the study was not to generalise the findings but, instead, to get an understanding of the phenomenon, namely, the CTE of high-performing South African high schools. The quantitative design allowed a more significant number of respondents across a provincial district to be involved, thus obtaining a representation of the surveyed population (cf. Maree & Pieterse 2007). The quantitative design also allowed the researchers to identify trends and issues in terms of CTE in the selected high-performing (above 70% pass rate) schools under investigation (cf. Brinson & Steiner 2007). The positivist paradigm that underpins quantitative research was useful in this research, as it allowed the researchers to adopt an observer role and evaluate the social world objectively (cf. Maree 2010).

■ Sampling and participants

Ten high schools in a district were randomly selected from a register of high-performing high schools provided by the Department of Basic Education. Four of the ten schools were formerly advantaged schools, and six were formerly disadvantaged schools. The district was selected because of its proximity to the researchers. From the sampled schools, all the teachers were invited to complete the questionnaire and give informed consent to participate in the research. A total of 367 questionnaires were distributed: 281 were completed and returned to the researchers, leading to a 76.6% response rate. The high return rate may be ascribed to the fact that the field worker distributed the questionnaires by hand and collected them the following day or as per arrangement with some schools.

■ Research instrument

The short version of the validated CTES, developed by Goddard (2002), was used in this research. Goddard (2002) found that using the 12-item scale was as effective as utilising the 21-item scale. The instrument tests the judgements of teachers about general teaching competence (GTC), which includes their teaching methods, skills, training and experience. General teaching competence denotes the teachers' perceptions of their and their colleagues' abilities to

teach successfully. The instrument also tests the task analysis; a perception of constraints and opportunities about the task at hand. It includes teachers' beliefs about the support learners get at home and in the community. Measuring teaching competence and task analysis may assist schools in identifying their strengths and staff development needs (McCoach & Colbert 2010).

The instrument is a 12-item, four-point Likert-type instrument designed to measure CTE. It includes an equivalent number of items for GTC and task analysis. In each category, three negatively phrased items are included to exclude socially acceptable responses.

■ Aspects of trustworthiness

The short version of the validated CTES, which was developed by Goddard (2002), was used to gather data. Goddard (2002) found the shortened 12-item scale to be equally effective as the original 21-item scale. The CTES (short form) was confirmed to be reliable and valid in measuring CTE beliefs. Klassen et al. (2011:35), however, argue that 'some of the content of the measures displays a lack of congruence with theory'. They declare that some 'items refer to environmental characteristics believed to influence teacher beliefs' and others 'focus on teachers' current abilities rather than the more theoretically congruent forward-looking capabilities' (Klassen et al. 2011:35). Another study found that the shorter version corrected the 'difference in the number of items by factor, making the structure of the scale more balanced' (Holanda Ramos et al. 2014:184).

■ Ethical aspects

Permission to conduct the research was granted by the Ethics Review Committee of NWU, which approved the study (reference number NWU-00024-12-A2) and the Department of Basic Education. Further permission was obtained from the principals of the participating schools, with all the participants signing written informed consent forms. The participants received the questionnaires to complete at a time that was convenient for them. Participation was voluntary, and participants could withdraw from the research at any time without being disadvantaged. The questionnaires were completed, anonymously and the information kept confidential. The data is kept confidential by keeping it locked in a safe and on a password-protected external hard drive, also kept in a safe. The names of the schools that participated in the research are also kept confidential.

■ Data-collection procedures

Questionnaires were distributed to all the teachers at the selected schools. None of the teachers was obligated to participate in the research. The

researchers explained the process of completing the questionnaires and consent forms to the teachers and principals at the different schools and then left the questionnaires and consent forms with the principals to be collected later. The questionnaires and consent forms of those who decided to participate were collected at the agreed-upon time.

■ Data-processing procedures

The completed questionnaires were analysed with the help of the statistical consultation services of the university that approved the study. The data were analysed utilising descriptive statistics involving the frequencies, mean scores and standard deviation. A *t*-test was applied between urban and township schools and between the responses of male and female participants, but no significant results emanated from these comparisons. The data were analysed according to the four categories specified by the research instrument: GTC positive, GTC negative, task analysis positive and task analysis negative. All the negative items (GTC negative and task analysis negative) were analysed in reverse; this means that the responses in the anchor of 'totally agree' and 'agree' will present a high CTE for the positive statements (Table 3.1 and Table 3.3) but a low CTE for negative statements (Table 3.2 and Table 3.4). Next, the findings are presented and discussed.

TABLE 3.1: Responses to questions on general teaching competence (positive statements).

Statements		Totally agree		Agree		Disagree		Totally disagree		Mean score
		<i>f</i>	%	<i>f</i>	%	<i>f</i>	%	<i>f</i>	%	
B1	Teachers in this school are able to get through to difficult learners	26	9.3	203	72.2	43	15.3	6	2.1	2.89
B2	Teachers here are confident they will be able to motivate their learners	41	14.6	197	70.1	38	13.5	1	0.4	3.00
B3	Teachers in this school really believe that every child can learn	57	20.3	16.1	57.3	58	20.6	2	0.7	2.98
Total	833	124	14.9	561	67.4	139	16.7	9	0.1	-

Key: *f*, frequency (number of responses).

TABLE 3.2: Responses to questions on general teaching competence (negative statements).

Statements		Totally agree		Agree		Disagree		Totally disagree		Mean score
		<i>f</i>	%	<i>f</i>	%	<i>f</i>	%	<i>f</i>	%	
B4	If a child does not want to learn, teachers give up	4	1.4	34	12.1	146	52.0	90	32.0	1.82
B5	Teachers here do not have the skills needed to produce meaningful learner learning	7	2.5	26	9.3	104	37.0	139	49.5	1.64
B12	Teachers here do not have the skills to deal with learner disciplinary problems	9	3.2	28	10.0	156	55.5	84	29.9	1.86
Total	827	20	2.4	88	10.6	406	49.1	313	37.9	-

Key: *f*, frequency (number of responses).

TABLE 3.3: Responses to questions on task analysis (positive statements).

Statements	Totally agree		Agree		Disagree		Totally disagree		Mean score		
	f	%	f	%	f	%	f	%			
B6 Our learners come to school ready to learn	25	8.9	109	38.8	135	48.0	6	2.1	2.44		
B7 Home life presents so many advantages that learners here are bound to learn	40	14.2	138	49.1	87	31.0	12	4.3	2.25		
Bs9 The opportunities in this country help ensure that our learners will learn	24	8.5	89	31.7	145	51.6	17	6.0	2.56		
Total	827		89	10.8	336	40.6	367	44.4	35	4.2	-

Key: f, frequency (number of responses).

TABLE 3.4: Responses to questions on task analysis (negative statements).

Statements	Totally agree		Agree		Disagree		Totally disagree		Mean score		
	f	%	f	%	f	%	f	%			
B10 Learning in this school is more difficult because learners are worried about their safety	2	0.7	20	7.1	133	47.3	123	43.8	1.64		
B11 Drug and alcohol abuse in the community makes learning difficult for learners	28	10.0	105	37.4	104	37.0	41	14.6	2.43		
B8 Learners here are just not motivated to learn	22	7.8	97	34.5	132	47.0	27	9.6	2.41		
Total	834		52	6.2	222	26.6	369	44.3	191	22.9	-

Key: f, frequency (number of responses).

■ Results

The data gathered from the respondents are captured in Table 3.1 to Table 3.4. The data are presented by first focusing on the characteristics of the schools (which include biographical information). This is followed by the responses on GTC positive, GTC negative, task analysis positive and task analysis negative.

■ Characteristics of schools

The majority (39.9%) of the respondents fell into the 40- to 49-year-old group, followed by 22.8% in the 50- to 59-year-old group. Most of the respondents were female (64.1%). More than half (56.9%) of the respondents were from urban schools, and 43.1% from township schools. The majority (76.9%) of the respondents held a BA (43.4%) or Hons or BEd (33.5%) degree. A vast majority (80.1%) of the teachers were on REQV14 (matric with four years of study), and 67.2% had been teaching for 11 years or more.

■ Responses on general teacher competence (positive)

The responses to the general competence (positive) statements (B1, B2 and B3) in Table 3.3 show that the majority (82.3%) of the respondents totally agreed or

agreed with the given statements, thus showing a strong CTE. This is in support of the high mean scores, which are all above 2.5. All these responses show a strong CTE, with mean scores that border on 'agree' (2.89, 3.00 and 2.98). This means that the respondents strongly believed that they were able to get through to difficult learners, they were confident in their ability to motivate their learners and they held the belief that every child could learn.

■ Responses on general teacher competence (negative)

The negative statements (B4, B5 and B12) in Table 3.4 also confirm the above findings. The total responses for 'disagree' and 'totally disagree' account for 87.0% of the responses, showing a high CTE. For the negative statements, responses in the 'disagree' and 'totally disagree' columns refer to high levels of CTE. Because the negative statements were analysed in reverse, mean scores between 1.0 and 2.0 show signs of strong CTE. The mean scores in this case varied between 1.64 and 1.86, which confirmed the high CTE levels. The responses to statement B12 show that 55.5% and 29.9%, respectively, of the respondents agreed and totally disagreed; they firmly believed that they had the skills to deal with learner disciplinary problems. This contrasts with the widely held credence that teachers struggle to maintain discipline in schools. A mere 13.2% were not confident about their skills to deal with learner disciplinary problems.

■ Responses on task analysis (positive)

The responses to the task analysis positive statements in Table 3.3 gave a different picture of CTE compared to the general competence statements. A total of only 51.4% totally agreed or agreed with the statements, which indicates a medium CTE. This indicates that almost half of the respondents showed a low CTE, while the other showed a high CTE. The mean scores also showed figures ranging between 2.25 and 2.56. The responses under Item B6 indicated that only 47.7% of the respondents were confident that learners came to school ready to learn. Item B7 showed that 63.3% of the respondents considered the learners' home life to present advantages that would encourage learners to learn. The majority (57.6%) of the respondents (Item B9) believed South Africa did not help ensure that learners would learn. Item B9 creates a drop in the CTE levels of the group for task analysis positive statements.

■ Responses on task analysis (negative)

The responses in Table 3.4 showed a negative medium to high task analysis, with the total figure for 'disagreed' and 'totally disagreed' amounting to 67.2%. The individual items, however, contrasted with some indicating a high, a medium and a low CTE. Item B10 showed a high CTE with responses for

'disagreed' and 'totally disagreed' totalling 91.1%. In contrast, Item B11 showed a medium CTE of 51.6%, with responses for 'disagreed' and 'totally disagreed', while B8 showed 56.6% for the same.

■ Discussion

The responses displayed a high CTE for GTC positive and GTC negative. The task analysis (positive) presented a medium CTE, while the task analysis (negative) scored a medium to high CTE. The results clearly showed that the teachers had no doubt about their overall competence to deliver the required outcomes and were not short-circuited by events and factors beyond their control.

The respondents showed high CTE concerning their ability to connect with complex learners (B1), their ability to motivate their learners (B2) and hold the belief that each child can learn (B3). They portrayed high CTE when it came to perseverance (B4), their skills to produce meaningful learner learning (B5) and their skills to deal with learner disciplinary problems (B12). The general expectation about CTE was that it should be strong, even in the face of potentially limiting factors, such as the home background of the learners. This finding was consistent with previous findings (cf. Brinson & Steiner 2007; Donohoo et al. 2018) on CTE in a developed country, showing no difference whether it concerned individual beliefs or collective beliefs.

The teachers' belief in their general competence to produce the desired results suggested a possible link with the teachers' academic qualifications, as the majority (76.9%) held BA, BA Honours or BEd degrees. The strong CTE in this category may be linked to the teachers' qualifications and teaching experience, but it can also be connected to the successes of previous years (Donohoo 2017; Zhou 2019). A total of 67.2% of the respondents had taught for 11 years or more. The findings suggested that high-performing schools had well-qualified staff (holding Bachelor of Arts, Honours or Bachelor of Education degrees) with appropriate teaching experience. This confirmed the finding of Cheung (2008) that teaching experience was a major factor contributing to teachers' efficacy and the discovery of Clotfelter, Ladd and Vogdor (2007) that teaching experience had a positive effect on learner achievement. It can therefore be of great value to school leaders and administrators to invest more in their teachers' training and keep their experienced teachers for as long as possible.

The responses of the teachers of the high-performing schools to task analysis items produced interesting results, as they showed a generally medium CTE. This correlates with findings by Mosoge et al. (2018) that show low task analysis at low-performing schools. Notably, Item 9 under the task analysis (positive) created a drop in the general CTE for task analysis (positive).

This item relates to the respondents' confidence in the country to provide opportunities to ensure that learners will learn.

Although 43.1% of the respondents were from township schools constrained by socio-economic status, they performed well in the matric examinations. This research suggested that a high CTE could transcend socio-economic status effects. This is in line with previous studies outside South Africa that CTE remained a powerful predictor of academic performance even if socio-economic status (Donohoo et al. 2018; Klaasen et al. 2011; Tschannen-Morgan & Barr 2004) and race (Goddard et al. 2017) were taken into consideration. This is valuable information for school leaders and administrators in a country with many low socio-economic status schools.

This finding was also confirmed by the teachers' perceptions that the opportunities presented by the country were not a good indicator of learner academic achievement (B9). Even though 51.6% of the teachers believed drug and alcohol abuse in the community made learning difficult (B11), 63.3% believed the home life of the learners presented many advantages for learners to learn (B7). The high performance of the learners in those schools suggested that their parents might be involved in their children's lives and education by enrolling them in high-performing schools. Therefore, parental involvement was confirmed as a key element for learner achievement (cf. Jeynes 2007). Ross and Gray (2006) also found that CTE strongly predicted commitment to community partnerships. They believe that staff with high expectations is more likely to open themselves to parental participation.

Item B10 showed high CTE in that most teachers (91.1%) believed that the learners were not worried about their safety. This was confirmed by the teachers' belief that they had the skills to deal with learner disciplinary problems (B12). These findings suggested that high-performing schools were relatively safe with teachers who were confident and skilled in dealing with learner disciplinary problems.

The social cognitive theory was predicated on the shared belief of people in their collective power to produce desired results as a critical element of collective agency (Caprara et al. 2003; Sorlie & Torsheim 2011). From the results of this study, it was clear that the teachers firmly believed in the collective competence of their colleagues to produce the desired results. These beliefs were not dependent on the socio-economic status of their learners, the poor opportunities presented in the country or the influence of drugs and alcohol abuse in their communities. The teachers in these high-performing schools were not unsettled by external factors that could have a negative effect on the academic performance of their learners. Instead, they believed in the collective capability of the teachers to reach their goals. The teachers believed not only in their own abilities but also those of their colleagues as a collective.

The strong CTE that was found amongst the teachers could also be linked to the qualifications and teaching experience of the teachers in these schools (cf. Cheung 2008). The teachers in these schools held the general belief that every child could learn; they believed in their collective ability to get through to difficult learners, and they believed in their collective skills to produce meaningful learning, their ability to persevere and their skills to deal with disciplinary problems. The strength of the perceived collective efficacy of these high-performing teachers was evident in their opinions, which concurred with the sentiment held by Bandura (2002). Teachers choose to work together or not, to believe in themselves and in others, to remain in the teaching profession and to further their studies. This is supported by the social cognitive theory that postulates that people's choices are impacted by the intensity of their efficacy beliefs (Goddard et al. 2004a).

The social cognitive theory also propounds that people operate collectively within an interactive social system. The assumption could be that this interactive social system refers only to the teachers within a specific school. However, the findings of this study suggested that the boundaries of this interactive social system went beyond the teachers' collective efforts to include the learners' home life. Most of the respondents in these high-performing schools mentioned their learners' home life as advantageous to their learning. One could argue that these teachers believed in their (teachers' and parents') shared collective power to produce the desired results. This belief might originate in the confidence that the parents had in putting their children in these schools, from the involvement of the parents in the academic work of their children or perhaps the involvement of the parents in curricular or co-curricular activities.

Most of the participants were women (64.1%). Though this study did not measure the difference in collective efficacy between male and female participants, it is worth noting that Akinbobola and Adeleke (2012) found that female participants scored higher on their CTE than their male counterparts. However, when it comes to perceived self-efficacy based on gender, Adetoro, Simisaye and Oyefuga (2010) found no significant difference between men and women. The finding of Adetoro et al. (2010) is consistent with the finding of Ford, Miller and Moss (2001).

The perceived collective efficacy of the teachers in these high-performing high schools signified that the teachers had confidence in the performance capabilities of their colleagues. The teachers in these schools believed that they could make a positive impact on the achievement of their learners. These findings were not dependent on the location of the schools, socio-economic status, the opportunities in the country or the impact of drugs and alcohol in their communities. This is encouraging for a country such as South Africa, where the performance of schools is measured based on the combined efforts of the teachers. Not only are these findings supported by the social cognitive

theory, but they also challenge the narrow view that would limit the interactive social system of CTE to the boundaries of the school. The researchers argue that the interactive social system should also include the home life (parental involvement) of the learners. The teachers in these schools are well-qualified, with suitable teaching experience (10 years or more). The high levels of CTE that these teachers depict can also be ascribed to the teaching experience they have accrued handling various challenging circumstances at school and in their classrooms. Teaching experience helps teachers to develop confidence and handle related situations in a better or more mature way the next time they occur (Cheung 2008; Erawan 2010). School leadership should therefore attempt to retain the services of teachers as long as possible and should give them the necessary support and help them to maintain high morale (Donohoo et al. 2020). School leaders of low-performing schools may benefit from these findings by enhancing the high collective efficacy beliefs of their staff by cultivating and providing organisational support through positive collaboration (Derrington & Angelle 2013; Erawan 2010; Lui 2019; Nordick et al. 2019; Ware & Kitsantas 2007).

■ Conclusion

School leaders at low-performing schools can improve the collective efficacy of their teachers by building the instructional knowledge and skills of the teachers, creating and encouraging collaboration amongst teachers across schools, providing teachers with actionable feedback on their performance (Becker 2017) and involving teachers in the decision-making in the school (Brinson & Steiner 2007). Furthermore, school leaders should continue in their efforts to strengthen and encourage parental involvement in their schools. Leadership in the government can also help by ensuring that there are opportunities for learning for learners in the country.

Part 3

School leadership

School principals of special education schools: Leadership and challenges

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■ Abstract

Considerable uncertainty surrounds the field that is known as ‘special education’. The school principal plays a pivotal role in ensuring that learners with special needs and disabilities reach established outcomes. Therefore, the school principal must, amongst other duties, enhance different learning styles to accommodate learners with disabilities. This study provides an overview of the state of special education schools in various countries and specifically in South Africa. A qualitative approach in the South African context was followed, where four principals of special education schools were interviewed. The study revealed that special education schools and special education differ from country to country. Regarding special education in South Africa, principals in the special education context experience challenges where the placement of learners with disabilities is concerned. The necessary support in terms of human capital and professional services is lacking in South African schools, which makes it difficult for principals to act as leaders.

How to cite: Van Jaarsveld, L 2022, ‘School principals of special education schools: Leadership and challenges’, in L van Jaarsveld, CC Wolhuter & CP van der Vyver (eds.), *Education Leadership: Scoping, perspectives and future trajectory*, AOSIS Books, Cape Town, pp. 51-72. <https://doi.org/10.4102/aosis.2022.BK383.04>

■ Introduction

The main purpose of any education system is to support the country's future citizens by enhancing their future and providing them with the necessary skills to be well-educated in a career (Idris et al. 2012). Education, per se, is the key to life, knowledge, self-confidence and self-respect (Bhardwaj 2016). Furthermore, education enables individuals to interpret things and prepare them for life. For this reason, every child, including those with disabilities, should be given the opportunity for education, as education is a fundamental human right.

Special education means that the mode of delivery is different from the mode of delivery in mainstream schools. The instructions are designed in such a way that it meets the uniqueness of the learner with a disability (Pullen & Hallahan 2015):

Specially designed instruction means adapting, as appropriate to the needs of an eligible child under this part, the content, methodology, or delivery of instruction and to address the unique needs of the child that result from the child's disability. (p. 37)

The goal of special education is to provide an opportunity for specialised education to learners with disabilities (Vaughn & Linan-Thompson 2003). However, when comparing special education globally, there is a clear difference in how special education is viewed.

■ Background of the study

To deliver education for all, different institutions have come to the fore to assist in providing education globally. In addition, various education-related world organisations have emerged. These organisations are, inter alia:

- The Association for Childhood Education International, which is a worldwide community of educators and advocates for education reform.
- The Global Partnership for Education, which operates in nearly 60 developing countries via a multilateral partnership that includes donor governments, international organisations and teachers.
- UNESCO, which provides and is committed to all-inclusive, excellent education globally, the realisation of everyone's right to education and the belief that education plays a fundamental role in human, social and economic development.
- The United Nations International Children's Emergency Fund (UNICEF), which recognises the rights of every child (Bezner 2014).

In 2000, at the World Education Forum in Dakar, Senegal, 164 governments agreed on the Dakar Framework for Action, Education for All – Meeting Collective Commitments, launching an ambitious agenda to reach six

wide-ranging education goals by 2015 (UNESCO 2015). 'Education at a Glance' is the product of a long-standing, collaborative effort between the governments of the OECD countries, the experts and institutions working within the framework of the OECD Indicators of Education Systems programme and the OECD secretariat. The OECD (2019) addresses the needs of a range of users – from governments seeking to learn policy lessons to academics requiring data for further analysis to the general public monitoring how their countries' education systems are progressing in producing world-class learners. Scholarly contributions focus on good learning outcomes, the policy levers and contextual factors that shape these outcomes and the broader private and social returns that accumulate to investments in education (OECD 2019).

The aims of UNESCO (2015) were to give equal educational access to all learners under all circumstances by 2030. The focus was on effective learning and obtaining the necessary life skills. The aims of UNESCO are in line with the policy of an education system as described by Steyn and Wolhuter (2008):

The education system policy can be defined as the statement of intent of the way in which the identified educational needs of the target group are being served. The education system policy has a binding nature and implies the realisation of decisions in terms of facilities to be provided, services to be delivered and activities to be executed. (p. 4)

However, the determinants influencing education systems should be considered as well. In this regard, demography as a determinant refers to numbers. Population numbers will influence the number of educational institutions and facilities. The geographical determinant will influence the places where educational institutions can be built. Science and technology as determinants will influence the nature, composition and content of educational programmes and the type of support services that can be provided. The language used by the target group determines the language used as the medium of instruction in a particular education system. The socio-economical determinant refers to the composition and social development of the target group. The economic situation as a determinant refers to the economic system, economic activities and the financial position of the target group. Politics as a determinant refers to people's opinions of how civilisation can be accomplished for all to be safe. In this regard, the view of the dominant party will have a larger effect on the education system. Philosophy can be a very strong determinant of the education system because, while the education system is the product of human action and human actions are determined by one's philosophy of life, the complete nature and functioning of the education system are influenced by a particular – or a mixture of more than one – philosophy of life. Culture as a determinant, embodied in beliefs, origin, history, language, politics and economy, has a huge influence on the education system of a target group. Globally, special education is influenced by these determinants.

Now the question arises regarding how and where special education schools fit into the discussion. Several studies contributed to the body of scholarship about special education schools. In this regard, Galvydytė and Ališauskas (2016) provide characteristics of learners with disabilities. Lovin, Kyger and Allsopp (2004) focus on learning difficulties and memory difficulties as disabilities. Van der Veen, Smeets and Derriks (2010), Hornby (2015) and Murphy (2018) focus on the controversy surrounding the accommodation of learners with abilities. 'Special education' is a wide-ranging term that explains that specially premeditated teaching is needed for learners who have a disability. Special education is in place to provide additional services, support, programmes and specialised placement or environments to ensure that all learners' educational needs are provided for (Hans 2015). The class size, teacher training, accountability and classroom practices of special education differ from general education. However, in broader terms, considerable uncertainty surrounds the field known as 'special education'. Moreover, 'special education' is a term laden with misconceptions and negative connotations (Abawi et al. 2018). For this reason, more research should be done to understand what special education entails, especially concerning the policies and structures of special education.

There seems to be a mutual understanding and sense of empathy when learners with special needs are involved. For this reason, studies have been conducted on various aspects of special education. Gita et al. (2008) conducted a study in Hungary to compare the national core curriculum and the special education curriculum to determine how suitable they were for children with disabilities in the field of physical education and sport. Aldaihani (2010) did a comparative analysis of inclusive education for learners with moderate learning difficulties in Kuwait and England. The study aimed to explore the factors necessary to successfully include such children in mainstream primary education, with special reference to science classrooms. Ngang (2012) conducted a comparative study on teacher leadership in special education classrooms in China and Malaysia. This research studied teachers' leadership approaches to determine the best approach for effective classroom management, teaching skills and learner achievement. Laskar (2014) too conducted a comparative study of the nature of special education for the blind in Kolkata and Tokyo. This study attempted to compare the nature of special education for the blind in Kolkata and Tokyo and the facilities provided by these forms of education. In addition, Hayashi (2014) did a comparative policy evaluation on the influence of inclusive education in Asia and Africa, concentrating on the educational rights of disabled learners in Cambodia. Lastly, Hans (2015) did a comparative study of special education and general education.

From these studies, many inferences can be made as to the meaning of special needs schools and special education.

■ Special needs schools: Same but different

The core concept of special education is captured in the words 'extra' and 'different' (Cook & Schirmer 2003:200). For learners in mainstream education, reading, writing and calculating are logical consequences of the teaching and learning process. However, for learners with disabilities, reading, writing and calculating are complicated. For this reason, these learners need customised instruction, a range of delicately ordered tasks focused on stimulus, awakening the learners' senses, and an adequately arranged environment. These learners should be approached differently and immediately rewarded for correct performance (Cook & Schirmer 2003:201). In this regard, competent leadership is necessary to provide guidelines on how to execute teaching and learning.

■ Special education: Misconceptions

'Special education' is a term laden with misconceptions and negative connotations (Abawi et al. 2018). Although it is difficult to define special education (cf. Cook & Schirmer 2003; Van der Veen, Smeets & Derriks 2010; Vaughn & Linan-Thompson 2003), Pullen and Hallahan (2015) provide the following general definition of special education:

Special education means specially designed instruction [...] to meet the unique needs of a child with a disability [...] Specially designed instruction means adapting, as appropriate to the needs of an eligible child under this part, the content, methodology, or delivery of instruction [...] to address the unique needs of the child that result from the child's disability. (p. 37)

Considering the above definition, learners with some disabilities, such as blindness or deafness, who use sign language or Braille, are obvious (Pullen & Hallahan 2015:37). Therefore, the mode of instruction is tailored to address the needs of these learners. However, teaching and learning require a different approach for learners with other disabilities, such as learning and intellectual disabilities, attention distractibility, hyperactivity and autism. Often these disabilities are not seen as a disability but simply a lack of discipline. This can be attributed to the ignorance of the authorities that evaluate these learners.

The goal of special education is to provide an opportunity for specialised education to learners with disabilities (Vaughn & Linan-Thompson 2003). Several authors have identified the characteristics of learners with disabilities. Galvydytė and Ališauskas (2016) theorise that learners with disabilities can be divided into two groups: those with low intellectual abilities and those with nonverbal learning disabilities. To simplify the difference, the National Association of Special Education Teachers (2019) states that some learners may experience reading problems and other difficulties with written expressions. Lovin et al. (2004) focused on learning difficulties and memory

difficulties as disabilities. Already in the 1960s, Clements (1966) provided several characteristics that are associated with learners with disabilities:

- these learners often act in the spur of the moment
- their perceptual-motor skills and coordination are underdeveloped
- there is no logical sequence in their thinking and remembrance
- emotional outbursts often occur
- they struggle to reach academic outcomes
- they often cannot express themselves through appropriate language.

One of the main characteristics seen in these learners is equivocal neurological signs. In another explanation of disabilities, the Virginia Department of Education (2020) adds disabilities such as attention discrepancy, attention deficit hyperactivity disorder, autism, hearing impairment, deaf-blindness, visual impairment, emotional disability, intellectual disability, multiple disabilities (two or more impairments simultaneously) and specific learning disabilities. Attempts to accommodate learners with these disabilities are controversial.

■ **Special education schools and principal leadership: A whole new experience**

The principals of special education schools are dealing with different challenges compared to mainstream schools. In this regard, Scott and McNeish (2013) note that a conducive environment within the education system has to be created to support teachers when they experience challenges while teaching occurs. In addition, the principals of special education schools emphasise intrinsic and extrinsic capabilities more than principals of mainstream schools do (Scott & McNeish 2013). Special education schools are characterised by a diverse population of learners, with each learner's behaviour being unique. Principals and teachers experience challenging circumstances and learner behaviour in these schools, which often result in stress. The leadership of principals of special education schools is put to the test when learners behave non-understandably. Principals' leadership must be adapted to understand and deal with learners with special needs (Inglesby 2014). In other words, principals of special education schools must be knowledgeable and competent to fulfil their role as leaders confidently. Inglesby (2014) further points out that principals need to act as instructional leaders. However, principals of special education schools are often not prepared for the uniqueness of learners with disabilities, the diverse cultures and the lack of knowledge regarding technical skills related to special education schools. These factors lead to principals often not able to apply their leadership fully.

Lynn (2015) argues that principals of special education schools have to create a conducive environment where transparency and good communication amongst the staff and between the principal and the staff are maintained so

that the learners with special needs will receive only the best attention and education. Furthermore, principals must study the latest research to keep abreast of the latest developments in special needs education. In addition, well-qualified teachers with the necessary knowledge to teach learners with special needs should be employed. What is also important is that principals should be visible in the classrooms and on the premises. Knowledge is built upon how and what is important for special education. In this way, principals can make a difference and bring about change within special education schools (Murphy 2018). Moreover, school leaders in special education schools can change the perceptions of the parents and community regarding learners with special needs so that they will accept these learners' disabilities and understand them (Murphy 2018).

■ South Africa and special education

Regarding South Africa and special education, the South African Department of Basic Education (DBE) stipulates that special education should be reinforced rather than eliminated. In 2001, the DBE (2001) made it clear that special education schools would be strengthened rather than abolished:

Learners with severe disabilities will be accommodated in improved special schools, as part of an inclusive system. In this regard, the process of identifying, assessing and enrolling learners in special schools will be overhauled and replaced by structures that acknowledge the central role played by educators, lecturers and parents. (p. 3)

The Ministry of Education appointed the National Commission on Special Needs in Education and Training and the National Committee on Education Support Services in October 1996 to explore and endorse all aspects of special needs and support services in education and training in South Africa. Since 2001, the view on special education has changed to an inclusive approach, where disability is embraced as a form of diversity instead of a debility. However, an education system needs to be prepared and responsive to the challenges of inclusiveness, and it seems that South Africa is not prepared to accommodate learners with disabilities. In this regard, Gina (2017) has reported the following issues regarding learners with disabilities:

- There is insufficient information on how many learners with special needs are not in schools and whether they may have been placed on a waiting list.
- When does the department intend to own Braille production systems?
- How will the department ensure that grants do go to special education schools?
- When was a proper investigation conducted into the state of affairs in special education schools?
- How will learners who are too old to be admitted to special education schools be dealt with amidst the rising demand for placement of learners in special education schools?

- How will the uncertainty regarding teacher training for learners with special needs be addressed, especially when inclusivity or special education schools are involved?
- Are there any no-fee schools for learners with special needs?
- An increase in the number of special education schools with boarding facilities is needed.

An overall summary by Gina (2017) provides evidence that special education in South Africa needs attention.

■ **Special needs schools in South Africa: Transoranje Institute for Special Education initiative**

South Africa has various special education schools in different provinces. This section discusses the Transoranje Institute for Special Education (TOIBO) initiative, which was founded on 13 March 1947. Since 1954, learners with disabilities have had the opportunity to receive financial support through this institute. As the TOIBO schools have residences, many learners from all over the country have been able to receive excellent specialised education at these schools. The schools include learners with hearing, visual and learning problems. All the schools have audiologists, a psychologist, part-time medical specialists, experts in the field of sign language, nurses, technical skills instructors and housemothers. Furthermore, psychologists, social workers, occupational therapists, speech therapists, physiotherapists, a supporting team of remedial teachers, nurses and medical specialists voluntarily offer clinics at these schools on a sessional basis. Five of these schools are discussed below.

The first school to be established by the TOIBO was for learners with severe hearing disabilities. The school provides specialised equipment to help learners as young as three-years-old and provides sign language and opportunities to enhance reading and writing skills. In addition, specific speech techniques in Afrikaans and English are priority. The learners receive special guidance and counselling when needed.

The second school was founded for visually-impaired learners – a multicultural, dual-medium (English and Afrikaans) school. A characteristic of this school is that about 70% of its learners come from disadvantaged communities and are housed in residences. The school is divided into a Grade R class, a primary school, a secondary school, a section dedicated to learners with multiple handicaps and a special education section focusing on practical skills for the workplace. The curriculum followed is the same as the mainstream schools.

The third school is dedicated to hearing-impaired learners. The school uses an auditory-verbal programme to teach hearing-impaired learners. Unfortunately, learners with hearing problems are often identified late,

complicating verbal communication. However, in this school, the problem is addressed.

The fourth school was established for learners with severe learning problems and learners who suffer from epilepsy. It is extremely important that these learners are helped individually. Individualised and specialised education is provided, as well as remedial education, occupational therapy, speech therapy, audio assistance and other support, such as that provided by nurses and counsellors. The learners follow the same curriculum as those in mainstream schools.

The fifth school caters for cerebral palsied, physically disabled and learning-disabled learners. Against the background of the literature and the five schools, the purpose of the research, the research questions and the methodology are discussed.

■ Reason for research and questions to be asked

Three main problems are identified when special education schools in South Africa are under discussion: the ignorance of parents regarding their children's disabilities, the ignorance of the authorities regarding the placement of learners with disabilities and the lack of adequate, competent support systems. Although institutions such as the TOIBO provide teaching and learning for learners with disabilities, the DBE does not really seem to understand what tuition of learners with disabilities entail. In addition, the necessary support personnel, such as occupational therapists, speech therapists, doctors and nurses, are insufficient. Amid these challenges, principals must lead and manage special education schools. Thus, the question arises: how do principals lead and manage special education schools so that sustainable teaching and learning can occur?

■ Research paradigm

The paradigm underpinning this study is the interpretivist paradigm. Interpretivism foregrounds the meaning that individuals assign to their experience. Intersubjective meanings are crucial to comprehension and meaning (Leedy & Ormrod 2013). Maree (2010) explains interpretivism:

Since behaviour is constituted by social conventions, interpretations are required; the facts do not speak for themselves. Interpretivism will allow a researcher not only to describe the social context, conventions, norms and standards of the particular experience, but also to reflect on the crucial elements in assessing and understanding the behaviour of the individuals. (p. 21)

The interpretivist paradigm uses systematic procedures but maintains that there are multiple socially constructed realities. Professional judgements and perspectives are considered in the interpretation of

data (McMillan & Schumacher 2010). This study was employed in the interpretivist paradigm, as interpretivism foregrounds the meaning that individuals – in this case, the principals of special education schools – assign to their experience. Interpretivism allowed the researcher not only to describe the social context, conventions, norms and standards of the particular school principals but also to reflect on the crucial elements in assessing and understanding the leadership of the school principals of special education schools (cf. Maree 2010).

■ Research design and methodology

In this study, the qualitative research design was followed to understand the experiences of the principals of special education schools (Gay, Mills & Airasian 2011):

Qualitative research seeks to probe deeply into the research settings to obtain in-depth understandings about the way things are, why they are that way and how the participants in the context perceive them. To achieve the detailed understandings they seek, qualitative researchers must undertake sustained in-depth, in-context research that allows them to uncover subtle, less overt, personal understandings. (p. 12)

As this study aimed to explore the leadership and challenges of principals of special education schools, a qualitative approach was used to understand the central phenomenon shared by the participating school principals (cf. Creswell 2014). The nuances and complexities of the particular situation in which the school principals were executing their daily duties were examined (cf. Leedy & Ormrod 2013). A phenomenological approach was followed to gather in-depth data from four principals to learn more about unknown aspects of leadership and challenges associated with the leadership of school principals. As the purpose of a phenomenological study is to describe and interpret the experiences of participants about a particular event to understand the meaning they ascribe to that event, this phenomenological study captured the essence of the experience as perceived by the principals of special education schools (cf. McMillan & Schumacher 2010).

■ Sampling

Qualitative sampling is the process where a selected group of individuals, usually few in number, are chosen to elaborate on a phenomenon and give their understanding of the phenomenon (Gay et al. 2011). With purposeful sampling, a more direct sampling is applied to answer the study's research questions (Creswell 2014:206). Purposeful or purposive sampling represents a given population (Gay et al. 2011:141). By using purposive sampling to gain a perspective on principals' leadership in special education schools, four school principals were selected. The sample consists of two female and two male school principals,

TABLE 4.1: Biographical information of participants.

Principal	Gender	Age	Years' experience at special school
Principal A	Female	64	33
Principal B	Male	63	27
Principal C	Male	57	33
Principal D	Female	55	22

all of them having served as school principals for many years. The schools of these principals are under the umbrella of TOIBO. One school is for visually-impaired learners, one for hearing-impaired learners, one for deaf learners and one for learners who suffer from epilepsy or experience severe learning disabilities. These schools are all located in one province. The gender, age and years of experience of the principals are displayed in Table 4.1 provides an overview of the participants. The focus was on the daily experiences of the principals in the special education context, and the biographical information contributed to the perceptions of the participants.

■ Data collection

Observations and interviews are the most common qualitative data-collection methods (Leedy & Ormrod 2013). Individual semi-structured, face-to-face interviews were conducted with the principals. These interviews involved general, open-ended questions intended to elicit views and opinions from the school principals. This approach helped the researcher to ask follow-up questions for clarity and depth (cf. Creswell 2014). The interviews were audio-recorded with the consent of the participants, and they were assured that the interviews would be treated confidentially. The purpose of the research was explained to them, and they were put at ease before the interviews started. The interview questions were formulated to understand the principals' leadership and challenges.

■ Data analysis

The interviews were transcribed, and an inductive data-analysis process was used to analyse the data. The data were coded and themed. The subthemes that emerged were categorised, and then the coded data were grouped into the appropriate categories. Then the researcher searched the data for emerging patterns, associations, similarities, contradictions, concepts and explanations of the data (cf. Maree 2010). The categories, patterns and emerging themes were linked to the research objective and discussed in relation to the relevant literature.

■ Findings and discussion

Although there were only four participants in this research project, the transcribed interviews amounted to 92 pages. Regarding the premises, all the

schools were neat and clean, but there were clear signs that the buildings were very old and renovation work was not done regularly. Furthermore, two of the schools are located in poor economic areas, one of which is also a dangerous area. Still, when entering the schools, a sense of peace and quiet prevailed. The remainder of the article addresses the findings and a discussion thereof.

■ Leadership qualities

At first glance, it seemed like the principals of the four special schools had seemed any other mainstream school principals. Upon closer acquaintance, it turned out that the special education school principals also had other characteristics. It is evident that a special education school principal must possess specific skills that are not necessarily expected from principals of mainstream schools. For the principal of a special education school, everything starts from a passion for learners with disabilities. Then follows a deliberate cognitive change. For these school principals, it is no longer about academic achievement but rather about the well-being of the learner. Participant A declared:

‘You must have a heart for the learner with disabilities [...] it is all about the well-being of a learner. We told them, “It is not that you cannot learn; you must just learn in a different way.”’ (Female, 64 years, 33 years’ experience)

In addition, leaders in special education schools need to know the limitations of their learners. For this reason, the principal of a special education school should not set unrealistic expectations of the learners. However, motivation is the essence, and recognition of the achievements of learners within their ability is crucial. For this reason, patience is a key characteristic that principals of special education schools must have. Participant A commented:

‘You still have to be able to show that he has to work because he has a backlog. If he needs a crutch to walk, that doesn’t mean it’s going to be easy, but he’ll be able to walk. If he is struggling to read, we will show you how to do it.’ (Female, 64 years, 33 years’ experience)

Principals of special education schools should have more knowledge, experience and insight than their peers in mainstream schools. They must have a mindset of getting the the wished service quality from teachers and learners with disabilities so that effective teaching and learning can take place in the school. In addition to their special curriculum, these principals need to study further in other fields to handle and accommodate unique cases within the set curriculum. It is important for these leaders to read widely and to become involved with organisations related to learning disabilities and other disabilities. Furthermore, they must have knowledge of the legislation on human rights, the handling of learners with disabilities and medical guidelines regarding learners with disabilities. Participant D, for example, obtained an Honours degree in law to familiarise herself with the relevant legislation so

that she could address issues related to legislation with confidence. She explained:

‘When a parent enters my office and is offensive and accuses me of a certain behaviour, I use my knowledge of the legislation and show him where I acted exactly according to the law. Parents whose children have disabilities are angry and take their anger out on us.’ (Female, 55 years, 22 years’ experience)

Participant B too indicated that the head of a special education school must have extensive knowledge of specific legislation:

‘[T]he *Schools Act*, because you can’t do well and then there is some legislation that stops you. Now, last I counted, we have about 38 laws about what we should be subject to if we want to do our job right.’ (Male, 63 years, 27 years’ experience)

In addition to the more general laws, such as the *National Education Policy Act*, the *Employment of Educators Act* and the *Labour Regulations Act*, other laws such as the *Child Protection Act*, the *Public Finance Management Act*, the *Road Traffic Act* (including the legislation concerning a public driver’s permit) and other legislation in relation to public service coordination are part of a school principal’s daily life. Although most of the laws are applicable to mainstream schools too, these laws must be taken into account in every act when special needs learners are involved, as it seems as if the parents of learners with disabilities are looking for loopholes to hold the school principal legally responsible.

Participant C revealed that his PhD in psychology helped him a great deal when it came to working with the parents and the learners at his school:

‘The parent with a disabled child also actually goes through a grieving process in the sense that the baby is born and then they find out that something is wrong. Their emotions go up and down because they don’t know how to handle the defect. Then they enter a phase where they are angry. So they get angry with anyone, and they are angry with the doctor who made the diagnosis, and they are angry with the school. So you have to have quite reasonable social skills with the parents.’ (Male, 57 years, 33 years’ experience)

Parents tend not to admit or declare that their children might experience some difficulty or special needs, whether a learning disability, an ear-and-hearing impairment or an attention deficit disorder. Parents or guardians may keep valuable information to themselves or ignore their child’s special needs, stemming the stigma associated with disabilities, impairments and disorders. In this regard, it is required of special education school principals to win parents’ trust. When parents trust the principal, they understand their children’s difficulties and accept that their children are placed in a special education school. For this reason, parent guidance is important, as parents go through a grieving process when they realise that their child may have a special need or disability. In addition, they are often overprotective. Therefore, the principal of a special education school needs specific skills to change parents’ ignorance into knowledge about their child’s disability.

Considering the abovementioned, the headship of school principals of special education needs schools demands strong leadership, well-thought-out decision-making, efficient problem-solving and ensuring swift execution of daily tasks. However, these principals experience many challenges and barriers.

■ **The Department of Basic Education versus special education schools**

In this theme, two main challenges emerged from the data: the allocation of learners and the allocation of education personnel and specialised medical support staff.

□ **Allocation of learners**

South Africa is not yet prepared to accommodate special needs learners in mainstream schools. When developed and developing countries are compared, a significant difference is evident. In developed countries, most of the learners who have special needs are placed in mainstream schools. So the learners function amongst their peers and receive the same instruction. However, in these schools, the teachers have facilitators in the class who help these learners. This is not the case in South Africa. Learners with disabilities (not severe disabilities) are sent to mainstream schools, but teachers are often ignorant of the fact that there is a learner with a disability in the class. Often these learners are viewed as having disciplinary problems. They are detained, and by the time they are eligible for special education schools, it is often too late, as learners with disabilities should be identified early.

The process of being placed in a special education school is a long, difficult one. The learner's problem should be discussed in collaboration with their teachers and parents. The district office evaluates the learner to determine their specific need. The necessary forms are completed, and the learner is placed in a special education school as needed. The school can be a school for the deaf, the visually-impaired or for learners with learning difficulties. School principals of special education schools and the DBE often have conflicting ideas when the placement of learners is under consideration. Principals regard it as political interference, as they have no say when learners are placed: 'We are being bombarded politically.' (Participant B, male, 63 years, 27 years' experience)

The problem can be traced back to a time when schools should have been built, but the government failed to build the needed schools. The result is that many schools have been neglected, and some have been burnt down. Special education schools are targeted, as these schools are in good condition and function effectively. Although special education schools have an admission policy and the law says that if a learner does not meet the admission policy requirements, the learner may not be placed in the school, the DBE is forcing

principals to take in these learners by simply placing the learner in the school. Consequently, learners with disciplinary or behavioural problems are placed in special schools. Some of these learners are much older than the learners with disabilities and special needs in their classes. In one case, a 17-year-old learner was placed in the class for children with autism, whereas the other learners were eight-years-old. Participant B said:

'They do not build schools; they stuff our schools fuller, even with children who do not actually fit in here.' (Male, 63 years, 27 years' experience)

In relation to the DBE, Participant A responded:

'So they [DBE] need to know what the type of learners are we are taking here, what are the dynamics in a class. You cannot just come and put the learner in a class of mine. I'm going to tell you, because I know in this class I now have two autists, I have a learner with uncontrolled epilepsy, and I have attention deficit or hyperactivity disorder. Now you come and you, from above, place a learner here with a disciplinary problem. So who cares: the 14 other learners' [rights] or this one learner's rights? And it's that frustration I had recently where they wanted to place a learner here with disciplinary issues and that it's just being pushed down and that it's expected of me as principal to manipulate my governing body [...] number one, to ignore my admission policy. I feel [...] you cannot do it. There's ethics and fairness and [...] There are all sorts of things that are overlooked [...] you know.' (Female, 64 years, 33 years' experience)

The result of such actions is that the principals of special education schools become despondent and discouraged.

At the same time, parents enrol their children in special education schools and may try to strengthen their claim to a place in the school by bringing in a representative. The parents demand the placement of their child, but the required steps are not followed. When the principals then state their case and refer to the system, they are accused of racism. It is then that principals feel they are losing the battle. Participant A explained:

'You have to fight a lot for the children with disabilities because what one does not always realise, is that each child is an individual, and although you put him under the umbrella of a specific learning-disabled learner, each learner's needs are not exactly the same. We take autistic learners, high-care autists, but every autistic learner is different.' (Female, 64 years, 33 years' experience)

Participant B added to the discussion of this problem and said:

'They [*the parents*] become rebellious. Then some of the parents will come here and say we are discriminating. Then we say, "No, we do not discriminate." Then we say, "No, no, we had to take the child." Then they get very angry. Then they say, "You do not want my child to be here." [*The parents*] put words in your mouth.' (Male, 63 years, 27 years' experience)

The persistent misconceptions on the part of the DBE and parents may emotionally drain the principals of special education schools and complicate their work.

Departmental officials and parents are ignorant about the allocation of learners and demand placements. The DBE allocates autistic learners six points, hard-of-hearing or deaf learners receive five points, bodily-disabled learners

score four points, learning-disabled and epileptic learners count three points, and two-and-a-half points go to mild-to-moderately disabled learners. When the teacher-to-learners ratio is converted, the allocations indicate that a school with 337 special education and disability (SEND) learners is equivalent to a school of 1 540 learners. However, the DBE seems to be ignorant of this division.

Education leaders who have visited developed countries and looked at the formulas and procedures that are followed there said that the heads in South Africa should wake up. However, it would be possible only if the heads in South Africa had the same means developed countries have. This is not always understood, and the principals of special education schools urge district officials to visit them and see to investigate these schools. However, their plea is often not heard.

□ Allocation of specialised medical support staff and educators

Learners with disabilities are fragile, especially the hearing-impaired. Disabled learners face a major challenge in maintaining themselves in a world different from theirs. Learners in special education schools need a varied range of medical assistance, including support from speech, occupational and behavioural therapists, social workers, audiologists, nurses and, in some cases, even doctors. Each learner has their own needs. In addition, a hostel manager, cooks, housekeeping supervisors, a hostel driver and a factotum are needed. When all the additional tasks are taken into account, it is clear that the principals of special education schools do not have an easy task. In the case of residences, principals are also responsible for managing them, which puts even more pressure on them. One of the participating principals in this study stays on the premises to keep an eye on the school and the residence.

As far as therapists, psychologists and nursing staff are concerned, there is a definite shortage of staff. This problem causes the principals to rely on voluntary support. On a positive note, several doctors offer their services free of charge to help the learners and the schools. Participant C commented :

'We have a medical doctor who comes about once a week. It's also charity work that the medical doctor does. Sometimes she comes more times than necessary, but then she comes for a morning; then she is here until she has [...] seen the sick children.' (Male, 57 years, 33 years' experience)

Clearly, the principal has built a good relationship with medical staff to enhance the support provided to the learners.

While mainstream schools are mostly early childhood, primary and secondary schools, special education schools in South Africa consist mostly of a nursery school, a primary school, a secondary school, a junior skills school and a senior skills school – all in one. Considering that each of these schools has its own division of learning areas, it seems unlikely that the principal can

manage the school with a limited number of educators. Often the principal cannot appoint a much-needed teacher because of a lack of finances. With regard to this, Participant A explained:

'Then, from Grades 4 to 7 we separate the children because of the language [...] is important to us, because their failures are only in language. So we feel they should be in an Afrikaans class or in an English class. They cannot walk together. So from Grades 4 to 7, there are two Afrikaans classes or three Afrikaans classes and one English class, and then from Grade 7 to Matric, they unfortunately have to be in a class together. So those teachers hold school in Afrikaans and English in every class.' (Female, 64 years, 33 years' experience)

Another complaint of the principals was that the importance of HoDs was ignored. The DBE regards it as unnecessary for an HoD to be appointed for each phase. With regard to this issue, Participant B gave the following explanation:

'My latest difficulty is trying to explain to them at the Department why I should have nine [*HoDs*]. Now they tell me, my school can only have eight. Now I say, "Whoa, whoa, whoa, number one, it's a combined school; there are some combined schools with nine HoDs, some technical schools with nine HoDs and then here and there a mainstream school, big schools that too have nine HoDs". Then I say, we should also have nine for the following reasons. Then I mention the reasons, which I mentioned: toddlers, primary school, high school, the subjects in the learning areas differ, the skill differs - I need a man for men's skills and for the ladies' or girls' skills, I need a lady. They say no, we cannot get [*one*]. I say, "But we then told you in that post model that it is coming; that's what we want; that's what we need." Now I have to get out of eight people, I now have to divide phases that are just unfair. Some have two phases in one, where you say at primary school now just put a Foundation Phase at the "Basic Phase" Department, I just have to throw "Early Childhood" with that, and now at the top of the skill I have to have boys and girls sitting at one [*HoD*]. You cannot, but I have to do it.' (Male, 63 years, 27 years' experience)

The principals were forced to use their own judgement again and make adjustments. These principals, therefore, adjusted the timetable so that the necessary curricular phases had an HoD who was not officially appointed to the HoD position but did the work. The HoD educators and the school's principal experience incredible work pressure and demand as they must ensure the welfare of other educators.

□ A quest for leadership

In this study, it became clear that the principals had to constantly apply leadership to be able to handle the challenges they were faced with from various places. It was not just about challenges but also about how the principals used their leadership to think out of the box, show initiative and think innovatively and creatively. For example, South Africa has 11 official languages. As three of the schools originated from the TOIBO, the main language was Afrikaans. However, these schools are being forced to use English as the medium of instruction. This creates a huge problem, as parallel-

mediums of instruction are not possible because of the disabilities of the learners. In addition, many of the learners have been brought up using a mother tongue that is neither Afrikaans nor English. For profound deaf learners, their first language is sign language. However, sign language was not yet an official language in South Africa. For this reason, these learners completed their examinations in English. Participant C explained:

'Sign language is what we call the 'home language', and the first additional language is English. This has implications, as the learners who can pick up certain sounds of a language are not necessary from an English-speaking home.' (Male, 57 years, 33 years' experience)

Adaptations must be made to overcome this burden. Principal C stated:

'Say where they will tend to write paragraphs and it's actually one sentence, we can break it down into shorter sentences; instead of difficult words, you use easier words, and then we can add an interpreter in the examination room - such adjustments.' (Male, 57 years, 33 years' experience)

Apart from the everyday obligations that rest on these principals' shoulders, three factors require special leadership: dealing with parents, workers and political issues. With regard to parents, the principals experience a sequence of events. The parents first deny that their child has a disorder. Then follows aggression and the accusation that the fault does not lie with their child. This is where strong leadership comes into play. When the principal applies their leadership by explaining the situation, acceptance and cooperation come from the parents' side. Participant C explained:

'Every now and then we get a parent who will have a problem with something, but what I just learnt, there is dealing with the matter [*sic*]; just do not leave him, because if you leave him, then he grows [*sic*] and he comes back later and he bites you or whatever. Now, logically in light of what I said about parents who also have to deal with their own emotions about their children and such, you have a way to go. Everything the school did was wrong until she finally accepted her child was deaf and mentally disabled, and when she did have those things in the end, you know, and realised that the fault does not lie with the school that her child does not perform, she says "whoa". I mean, she supports us well, but now yes [...]. The conflict that often arises between parents and such is a lot of communication stuff, you know.' (Male, 57 years, 33 years' experience)

Principal C gave credit to one of his HoDs, who strengthened his leadership. The HoD speaks many languages understood in South Africa, and whenever a complex problem must be resolved, he requests the HoD to sit in on the discussion as a translator or signer. In this way, he uses his leadership to eliminate miscommunication.

The principals' leadership is also tried to manage the residences' employees. Culture and background play a significant role here. Participant C explained that a worker might select another worker and turn against them. The principal (Participant C) has to investigate the matter, and upon closer examination, it may merely be an attempt to discredit a specific worker. In one such a case, a

worker accused another worker of witchcraft. Participant C acknowledged that he had learnt through experience that it was wise to divide meetings into smaller groups and then hold separate meetings with each group.

Wordplay forces many leaders to think quickly on their feet. Principals of special education schools are not spared this. With reference to this, Participant A noted:

'Recently we had a code of conduct discussion. The parents of the school, at the annual general meeting, they approved certain rules, one or two of their rules, and then we want to discipline the learner and then the parent goes directly to the Department of Basic Education. Then an investigation is ordered and then that word is not used - 'racism' - but 'human rights' and 'culture'. So it's not a pertinent one [...] and it probably depends on how you approach them when they come from head office. Thus, certain cases are very disrespectful; other cases depending on the panel that comes. It's controversial, but now, yes [...].' (Female, 64 years, 33 years' experience)

It is clear that principals of special education schools experience just as many challenges as principals of mainstream schools, but the extra factor of teaching learners with special needs or disabilities distinguishes these principals from principals of mainstream schools.

■ Discussion

In this study, special education schools in different countries were studied through the literature, and an in-depth investigation of the leadership and problems of principals in South African special education schools was conducted. Although various efforts have been made by world organisations, such as UNESCO (2015), to establish special education and schools, special education is not applied effectively in some countries. To complicate matters further, demography, geographical determinant, the science and technology determinant, language differences, the socio-economic determinant and the economic situation in countries differ, and for this reason, proper implementation and application of special education differ too. Steyn and Wolhuter (2008) point out that any education system must look after the target group in order to achieve the best teaching. However, it is not an easy task when special needs education is the point at issue, especially in countries where economic stress is experienced.

Apart from the determinants mentioned, not all mainstream schools lend themselves to accommodating learners with special needs. In line with the concepts of Cook and Schirmer (2003), special education schools are indeed different from mainstream schools. However, being different does not mean that these schools should be treated differently than mainstream schools, as each learner has the right to education. In any education system, every learner must be allowed to teach and learn. Ideally, many learners with disabilities, especially those with learning disabilities, would rather be placed in mainstream

schools, but then enough support should be provided to them by facilitators to reduce the teacher's workload. Some countries have the necessary support in their classrooms to deal with learners with special needs. The ideal would be to send learners with special educational needs to special education schools where specialised educators can provide the required special needs education. However, South Africa has a large number of people who belong to the lower socio-economic class. With an unemployment rate of 34% in 2021, more pressure is put on parents to enrol their children who need special education in special education schools. In addition, the DBE cannot address all the issues raised in the *Inclusive Education and Special Education Report*. Gina (2017) makes it clear that special education in South Africa needs attention.

Although countries differ concerning 'inclusivity', each country must determine how they accommodate learners with special education needs and disabilities (SEND) in the education system with an accommodating curriculum. In countries where learners with disabilities cannot be accommodated in mainstream schools, and there are special education schools, the placement of learners should be carefully considered and evaluated. In this regard, qualified people should be responsible for the evaluation of learners. Placing learners in special education schools simply because they display behavioural problems is unacceptable. The meaning of the statement that 'special education means specially designed instruction to meet the unique needs of a child with disability' (Pullen & Hallahan 2015:37) must be understood very clearly. However, some departmental officials in South Africa have limited knowledge of what exactly the meaning of 'special needs' is. In South Africa, some appointments have been made in the DBE where the appointees do not have a background or experience in education. This leads to a lack of informed knowledge about special education schools.

For this reason, inconsistent decisions are made concerning special education needs and disabilities (SEND) school admission policies. In addition, good relationships between DBE officials and principals of SEND schools are critical. That way, learners will be placed in suitable SEND schools, learn how to maintain themselves in society, and successfully find employment. It all starts with the school principal. In addition, good relationships between DBE officials and principals of special education schools are very important. That way, learners can be placed in the right schools and be prepared to maintain themselves in society and be successfully employed. It all starts with the school principal.

However, principals worldwide experience a great deal of pressure from different sources, and their actions and choices are closely scrutinised and often criticised. For this reason, principals of special education schools experience more challenges than principals of mainstream schools. Strong leadership is therefore crucial. As Inglesby (2014) notes, with good instructional

leadership from the side of the school principal, effective education will be possible for learners with disabilities. Principals need to be informed, competent and prepared, yet empathetic. In addition, a collaborative leadership style with skills in problem-solving, conflict resolution and team building is essential. Principals of special education schools cannot handle everything alone; therefore, trust is important so that they can confidently delegate their tasks to the benefit of their learners. Inglesby (2014) specifically refers to the need to create an inclusive culture and ethos. This can only be achieved if the principals of special education schools have strong leadership qualities.

As far as parents are concerned, accepting their child's disability remains challenging. Principals of special education schools face the challenge of empathising with parents about their child's disability. Transferring knowledge regarding special needs requires good leadership. Although Vaughn and Linan-Thompson (2003) and Galvydytė and Ališauskas (2016) provide a list of characteristics of learners with disabilities, parents often do not believe or accept their child's disability. By being knowledgeable about the problem their child is experiencing, they are strengthening support for the child. In this regard, it is important that good cooperation with the principal is established, as it builds confidence. In that way, parents can confidently put their child in the care of a special education school where the principal and knowledgeable teachers support the learner so that they can be returned to the mainstream or become independent to pursue a career.

The more information about disabilities is disseminated, the more communities tend to include learners with disabilities in the community. Through good planning, learners with disabilities are already being employed for periods during their school years so that they gradually become accustomed to the community and how to interact with other people. However, good communication between principals of special education schools and businesses is required for these learners to be accommodated in the community. Simply being a principal of a special education schools is not enough. Although many scholars, such as Cook and Schirmer (2003), Van der Veen et al. (2010), Vaughn and Linan-Thompson (2003) and Pullen and Hallahan (2015), have tried to define special education, there is still a lack of knowledge among the society of what 'special education' implies. A literate community in terms of special education becomes a supportive community. In this way, the hands of the principal of a special education school are strengthened.

■ Conclusion

It is clear that principals of special education schools lead and manage their schools under difficult circumstances. They make use of the necessary

knowledge and support to carry out their daily tasks effectively. Their constant battle to accommodate understanding for learners with special needs continues. Learners with special needs are a worldwide phenomenon. The responsibility to eliminate misperceptions regarding special education lies within society itself. It starts with parents accepting the fact that their child has a problem. The responsibility of the principal, community and education department in any country is to support a child with special education needs so that they can become a world citizen who can lead their life independently. It is inhumane to ignore children with special needs. Without the necessary empathy, support and acceptance, the task of the principal of a special education schools will be even more difficult. Therefore, communities must unite to assist the principal's task, ensuring that skilled learners are accepted in the community and society to make a difference.

Entrepreneurial leadership: A key leadership style in uncertain times

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■ Abstract

This chapter disseminates the findings of a study that sought to advocate for entrepreneurial leadership as a key leadership style in uncertain times. Recent developments in school leadership have heightened the need for school leaders to adopt leadership approaches and styles that can enable them to survive the turbulent terrain of complex school leadership occasioned by uncertain times such as the onset of the COVID-19 pandemic. The study followed a qualitative phenomenological strategy of inquiry underpinned by the interpretivist paradigm. Data were generated by means of semi-structured interviews and field notes. The data analysis followed the data analysis spiral espoused by Leedy and Ormrod (2013). A recurrent theme in the findings is that entrepreneurial school leaders are innovative, proactive risk-takers.

How to cite: Khumalo, JB & Van Jaarsveld, L 2022, 'Entrepreneurial leadership: A key leadership style in uncertain times', in L van Jaarsveld, CC Wolhuter & CP van der Vyver (eds.), *Education Leadership: Scoping, perspectives and future trajectory*, AOSIS Books, Cape Town, pp. 73-95. <https://doi.org/10.4102/aosis.2022.BK383.05>

These qualities enable them to navigate the complexity of the school leadership landscape and contribute to the improvement of their schools. The study concludes that entrepreneurial leadership is a suitable leadership style to adopt to lead a school during uncertain times.

■ Introduction

The contribution of leadership to school improvement in South Africa is a matter that has dominated the public debate on the quality of school leadership for some time now. What makes this subject more relevant in the public domain are concerns about the leadership styles of school principals and whether such styles contribute to school improvement. One of the strategic aims of the DBE (2017), which is congruent with the goals of the National Development Plan of 2030 (National Planning Commission 2012), is to develop school principals who are regarded as 'highly skilled individuals' by developing their human capacity. A corps of such school leaders will be deemed 'proactive, innovative and visionary' (Van Jaarsveld, Mentz & Van der Walt 2016:52). Leaders who demonstrate these qualities are needed in the current arena of complex school environments occasioned by the onset of the COVID-19 pandemic. Currently, schools need capable leaders who are entrepreneurial not only in their thinking but also in their approach.

Deepening the enormity of school leadership, there lies a perception that 'South Africa is faced with the additional challenge that school principals in this country are often ill-prepared for the responsibilities of the position' (De la Rey 2018:11). Concerns have been raised about school leadership in South African schools and the contribution thereof to school improvement. There is empirical evidence to suggest that school principals are primarily being primed in a classroom – most likely accomplished teachers in the classroom, showing good results in teaching specialised subject content (Bush, Kiggundu & Moorosi 2011; De la Rey 2018; Mathibe 2007). These concerns are reinforced by the need for professional development of school leaders to adopt appropriate leadership styles that will enable them to contribute to school improvement.

The need for the adoption of entrepreneurial leadership is reinforced by the argument made by Pihie and Bagheri (2013:1) that 'entrepreneurial leadership, as a distinctive type of leadership required for dealing with challenges and crises of current organisational settings, has increasingly been applied to improve school performance'. Moreover, research has shown that a school principal's entrepreneurial behaviour positively impacts organisational innovativeness and the changes brought about in schools (Dahiru & Pihie 2016; Pihie & Bagheri 2013). Entrepreneurial leadership was deemed to be in its infancy in 2017 (Leitch & Volery 2017), but recent developments in the leadership landscape have catapulted it into a sought-after leadership style to take organisations such as educational institutions forward in a meaningful way.

■ Problem statement

For several years, the lack of practising entrepreneurial leadership has been one of the school leadership problems experienced in South African schools. This form of leadership is exercised to implement the entrepreneurial spirit in the management of the school and all the educational resources (Gupta, MacMillan & Surie 2004). Some researchers have attempted to combine the concepts of leadership and entrepreneurship into a new leadership model – entrepreneurial-minded leadership (entrepreneurial leadership) – in order to explore leadership and entrepreneurial behaviour (Tarabishy et al. 2005). The researchers' leadership model originated from the recognition that school leaders must be entrepreneurial-orientated to lead their schools creatively and creatively.

In an endeavour to prepare the school leaders of the future, South Africa's blueprint for national development, the *National Development Plan* (National Planning Commission 2012) seeks to:

[G]radually give principals more administrative powers as the quality of school leadership improves, including in financial management, the procurement of textbooks and other educational material and the management of human resources. These delegations ensure that principals are held accountable for their schools. The National Development Plan puts school principals, and school management in general, at the centre of educational improvement. It emphasises that principals should be agents of change and innovation, while being held increasingly accountable for learning outcomes, using reasonable targets that take into consideration the fact that socio-economic challenges vary from school to school. (p. 301)

Compliance with the basic management processes referred to in this goal of the National Development Plan is important and can assist in ensuring that schools are at least minimally functional. However, beyond compliance, there is a need for exemplary leadership and personal character on the part of school leaders (National Planning Commission 2012). As such, school leaders are encouraged to be, amongst other things, entrepreneurial in both behaviour and attitude. The orientation and practice of entrepreneurial customs of school leaders can thus be 'judged in terms of whether opportunities for improvement are proactively identified and acted upon' (Xaba & Malindi 2010:78). School leaders must identify sustainable ventures to generate supplemental and needed resources and opportunities to improve and reinforce teaching and learning practices.

A number of studies have revealed that there are various complexities and challenges in school organisations, such as higher demands for improving the quality of education in public schools, fast changes in the environment and growing shortages in school resources and funds (Eyal & Kark 2004; Eyal & Inbar 2003; Xaba & Malindi 2010). Therefore, scholars believe that 'school principals require entrepreneurial leadership characteristics and the knowledge

and competence to execute their tasks based on leadership principles' (Pihie, Asimiran & Bagheri 2014a:2). One of the reasons for schools embracing entrepreneurial leadership is that some schools are highly successful and can be regarded as high-performing, while others are not (De la Rey 2018).

The main purpose of this study was to develop an understanding of entrepreneurial leadership as a key leadership style in uncertain times. In addition, the study sought to unpack the entrepreneurial leadership practices of school leaders that lead to school improvement and success.

■ Conceptual-theoretical framework

The central argument of this chapter is to highlight entrepreneurial leadership as a key leadership style necessary to lead schools during uncertain times, such as during the COVID-19 pandemic. Leading during uncertain times requires visionary thinkers and innovative, motivated, proactive risk-takers (De la Rey 2018, 2016). Several framework definitions will explore entrepreneurial leadership further, culminating in synthesising clarification of this chapter's concept. The authors also describe the four key areas of 'entrepreneurial competence' and illuminate entrepreneurial leadership qualities to justify such recommendations to school leaders with a conceptual-theoretical framework teaching entrepreneurial leadership skills. As a conclusion to the section, the authors discuss the 'social exchange theory' to help the reader understand entrepreneurial leadership.

'Entrepreneurial leadership' has been defined by several authors, but their definitions converge around similar leadership traits of being a visionary thinker who is innovative, motivated and willing to take risks and proactive in taking initiative (Esmer & Dayi 2017; Roomi & Harrison 2011; Xaba & Malindi 2010). Entrepreneurial leadership can also be defined as 'a new and modern type of leadership that is a combination of leadership qualities and spirit of entrepreneurship' (Esmer & Dayi 2017:112). Similarly, entrepreneurship implies an 'entrepreneurial orientation, which relates to seeking out opportunities that improve both the material and instructional conditions' of schools (Xaba & Malindi 2010:77). For Roomi and Harrison (2011:1), entrepreneurial leadership means 'having and communicating the vision to engage teams to identify, develop and take advantage of an opportunity in order to gain competitive advantage'. Moreover, entrepreneurs are 'leaders par excellence who identify opportunities and marshal resources from various stakeholders in order to exploit these opportunities and create value' (Leitch & Volery 2017:147). Woods, Woods and Gunter (2007) further define entrepreneurial leadership as:

[7]he predisposition to and practice of achieving valued ends by creating, taking or pursuing opportunities for change and innovation and finding new resources or utilising in new ways existing resources (financial, material and human). (p. 237)

The following more comprehensive definition of entrepreneurial leadership is provided by the Pashiardis (2014) study:

[E]ncouraging relations between the school and the community and parents, promoting cooperation with other organisations and businesses, discussing school goals with relevant stakeholders, utilizing appropriate and effective four techniques for community and parental involvement, promoting two-way communication between the school and the community, projecting a positive image to the community, building trust within the local community, and communicating the school vision to the external community. (p. 20)

In this chapter, the term 'entrepreneurial leadership' broadly refers to school leaders who are future-driven, innovative, motivated, and proactive risk-takers and prosper to form successful schools during this complex era of scarce resources and minimal financial support from the South African government.

The characteristics and behaviour of entrepreneurial school leaders have been identified in the literature and are categorised according to the four key areas of entrepreneurial competence: (1) strategic thinking and visioning, (2) team building, personnel management and development, (3) communication and negotiation skills and (4) mobilisation and optimisation of financial resources (Nastase, Dobrea & Valimareanu 2016:8). Each of these key areas of entrepreneurial competence will be described in the following paragraphs to accentuate the characteristics and behaviours that entrepreneurial school leaders are expected to demonstrate. The categorisation of the characteristics and behaviours of entrepreneurial leadership into competence areas is an offshoot of scrutinising and synthesising the literature on studies conducted in this field by several authors (Borasi & Finnigan 2010; Gupta et al. 2004; Pihie et al. 2014a). Each key area of entrepreneurial competence comprises characteristics and behaviours that school leaders must practice.

■ Strategic thinking and visioning

Entrepreneurial leaders are expected to be strategic thinkers who are visionary and able to look into the future. Esmeri and Dayi (2017) suggest that entrepreneurial leaders believe that an organisation should strategically have the skills of entrepreneurship to create the highest value. Pihie et al. (2014a:4) observed that features of entrepreneurship are applied in schools 'to enhance their success in providing an effective teaching and learning environment'. Entrepreneurial leaders are expected to have 'the ability to envision the future and create a scenario of innovative possibilities, to develop various entrepreneurial opportunities and take the risks to enact the vision' (Pihie et al. 2014a:3). In essence, 'an entrepreneur is an innovator that creates and exploits opportunity, consequently creating value and change towards the economy and society' (Rahim et al. 2015:194).

■ **Team building, personnel management and development**

Entrepreneurial leaders are expected to be able to create a culture that enhances entrepreneurship amongst the staff. They should be agents of change who can bring all stakeholders on board to achieve the school's vision (Currie et al. 2008). The ability to build a strong team and manage and develop staff requires leaders to be able to resolve conflict and build relationships. Entrepreneurial behaviour and a concomitant culture of entrepreneurship are expressed in a principal's ability to think of innovative ideas to develop the school and the ability to motivate teachers to think of more innovative ideas to develop the school (Dahiru & Pihie 2016).

■ **Communication and negotiation skills**

Entrepreneurial leaders' communication and negotiation skills encapsulate the ability to articulate their vision clearly and build networks with peers and counterparts. The effectiveness of networking has been exemplified in Pashiardis and Savvide's (2011) preference for local, national and international networks. Kinlin (2012) clarifies that visionary leaders are forward-thinking and have the ability to inspire confidence and communicate a sense of purpose. Entrepreneurial leadership concentrates on the ability of a leader to identify new opportunities aimed towards making the organisation more effective, and it is seen as a vehicle for the creation of change and innovation in an organisational setting (Dahiru & Pihie 2016; Reimers-Hild & King 2009). De la Rey (2018) draws the following conclusion:

[E]ntrepreneurial leadership is a unique leadership style where the individual has the ability to influence others to perform better, share his/her vision, recognise new opportunities, generate new ideas, think in an innovative manner, seek opportunities and is willing to take a risk. (p. 19)

■ **Mobilisation and optimisation of financial resources**

In the present era of uncertainties occasioned by the impact of the COVID-19 pandemic on schools, it is expected of entrepreneurial school leaders to mobilise and optimise the limited resources they have or seek to have. Borasi and Finnigan (2010) state that entrepreneurial leaders should not be constrained by resources but be ready to seize opportunities. The mobilisation of resources also entails 'the creative use of resources in order to aid the implementation of the school mission' (Pashiardis & Savvide 2011:415). Entrepreneurial leaders are motivated by challenges and are not deterred by problems such as the absence of resources. They would rather confront such an issue by providing solutions to the problem (Dahiru & Pihie 2016). Thus, entrepreneurial leaders would rather exploit opportunities that exist to turn their schools around.

School leaders need to develop entrepreneurial leadership skills because schools operate in a rapidly changing world where there is increased accountability, decentralisation and a need for improved performance in teaching and learning. Pihie et al. (2014a:4) point out that 'school leaders need to be able to manage crisis, uncertainty and complexity'. Schools now operate in an era of 'complexity where the only stable factor is constant change and where paradox, ambiguity, and uncertainty are becoming the norm' (Pashiardis 2014:9). As a result of the heavy burden placed on school leadership by the COVID-19 pandemic, entrepreneurial leadership is necessary, more than ever, to implement an entrepreneurial spirit in the leadership and management of the school and educational resources. Park (2012:89) concludes that 'school change or innovation has become buzzwords for all schools, especially because they must strive to be structurally effective and adaptive to rapidly changing educational environments'. In order to bring about such change, entrepreneurial leadership is crucial because it resonates with the role of school leaders as change agents.

Walker, Brynat and Moosung (2013:407) note that there is an 'increasing global emphasis on accountability which is manifested at both national and international levels'. The global trend identified by Walker et al. (2013) also manifests itself in South Africa, where school leaders are becoming increasingly accountable to their stakeholders, that is, the learners, parents, governing bodies, the community and the government (Levin 2003; Pashiardis & Savvides 2011; Scott & Webber 2015). South African schools also participate in international tests that involve the rest of the world and single out the quality (or lack thereof) of education for the results obtained. Because of the need for accountability to the DBE and other stakeholders, high expectations are placed on school leaders to adopt innovative leadership approaches that will lead to school improvement.

The decentralisation of decision-making in school leadership and governance necessitates adapting suitable approaches to school leadership. The evidence in the literature shows that (Pashiardis & Brauckmann 2009):

[R]egional and national governments are devolving decision-making powers with respect to budgets, curriculum, staffing and other leadership and governance matters to school leaders, recognising that individual context is important and that leaders need to make decisions based on the needs of their stakeholders. (p. 123)

In such contexts, school leaders are expected to adopt an entrepreneurial spirit in order to lead their schools innovatively to achieve their vision. Levin (2003) concurs that the logic of decentralisation assumes that changes in governance are key to the improved performance of schools. Moreover, the impact of this policy shift has led to an increase in expectations with regard to what it means to be a school leader (Pashiardis & Savvides 2011). Decentralisation also requires 'increased sophistication as educators will be required to understand

the business model as well as the education model of any organization' (Levin 2003). Accordingly, entrepreneurial leaders should be capable of adopting an entrepreneurial approach that will contribute to improved school performance.

Entrepreneurial leadership is considered to be indispensable for improved performance in teaching and learning. An entrepreneurial style of leadership should be able to contribute to the quality of teaching and learning, which is such that it creates a 'citizenry with a capacity to compete successfully in the global village' (Scott & Webber 2015:113). Amongst the things that entrepreneurial leadership should enable are a variety of factors affecting school performance and the urgent need to prepare learners for their highly competitive future (Xaba & Malindi 2010). De la Rey (2018:11) concurs that one of the reasons for the poor academic results in schools in South Africa is that 'school principals are not adequately trained, and therefore do not have the required skills for effective school management and leadership'. However, regarding this, entrepreneurial characteristics and skills can be used to improve school leadership, as one of these skills is the ability to influence others in the school setting or environment (Dahiru & Pihie 2016).

The social exchange theory is at the heart of our understanding of entrepreneurial leadership as a preferred school leadership style during complex and uncertain times. This theory provides solid theoretical grounds for explaining why leadership behaviour may induce higher levels of positive behaviour and attitude by employees (Park 2012). Previous studies have reported that when the members of an organisation are treated more fairly, given more autonomy and are better emotionally supported, they reciprocate by developing a positive attitude toward the organisation and delivering better performance (Blau 1964). This view is supported by the finding of Kim, Park and Miao (2017) that the effects of entrepreneurial leadership depend on specific types of employee behaviours and attitudes. The work of Kim et al. (2017) on entrepreneurial leadership is complemented by Xaba and Malindi's (2010) study that has uncovered the entrepreneurial behaviours of innovation, proactiveness and risk-taking. As noted by Xaba and Malindi (2010:75), school leaders in 'historically disadvantaged schools in South Africa often face enormous challenges relating to resource acquisition to ensure effective education delivery'.

Blau (1964) postulates that the social exchange theory characterises a relationship by the exchange of resources that occurs between two parties, such as an organisation and its employees. In the school context, the relationship is between a school as an organisation and an entrepreneurial school leader as an employee. When employees are satisfied with the rewards, incentives or evaluation systems of their organisation, they are motivated to maintain positive, prosocial and reciprocal relationships and to have a positive attitude towards their organisations (Blau 1964). According to Blau, through reciprocal relations, individuals are actively engaged in voluntary behaviour,

and voluntary behaviour stemming from employees' satisfaction encapsulates their drive to be innovative, proactive risk-takers.

Entrepreneurial leadership may 'elicit higher levels of employee trust and creativity because entrepreneurial leaders strategically present a variety of challenges and missions and demonstrate strong leadership, particularly in extraordinarily complex situations' (Kim et al. 2017:153). Leaders who influence their employees and encourage them to participate in organisational processes are accountable beyond their expected work contribution and are perceived as being interested in engaging in the process of social exchange and reciprocation. Kotelnikov (2007) concurs that without innovation, new products, new services and new ways of doing business would never emerge, and most organisations would forever be stuck doing the same old things the same old way.

The emphasis on innovative approaches to school leadership has led experts to link school innovativeness with organisational entrepreneurship (De la Rey 2018). In order to improve learning outcomes and bring about school innovation, school principals must demonstrate characteristics associated with entrepreneurial leadership, which may lead to higher levels of trust and creativity amongst all stakeholders. School principals can benefit from entrepreneurial leadership because they face challenges and constraints in terms of resources every day (De la Rey 2018). The outbreak of the COVID-19 pandemic has exacerbated this precarious situation.

■ Research design and methodology

■ Paradigm, research design and method

This chapter's study used a qualitative research approach to understand the phenomenon of entrepreneurial leadership as experienced by school principals. According to Maree (2010:21), interpretivism 'foregrounds the meaning that individuals assign to their experience'. One's behaviour is founded on social principles and should be interpreted as such. Through the lens of interpretivism, one's norms and standards within a social context make sense. Building upon the understanding of interpretivism, a qualitative research design falls into this paradigm. According to Leedy and Ormrod (2013:95), qualitative research seeks to probe deeply into the research setting 'to obtain an in-depth understanding of the way things are, why they are that way and how the participants in the context perceive them'. Qualitative research is descriptive and reflects the voice of the participants. As this study explored the roles of entrepreneurial leadership, it is clear that the research at hand is phenomenological in nature. A phenomenological study tries to grasp people's perceptions and perspectives in relation to a situation (Leedy & Ormrod 2013), which, in this case, are the perspectives of school principals as entrepreneurs in the school environment. Phenomenologists aim to describe

TABLE 5.1: Profile of participants.

School	Gender	Years of experience	Number of learners	Urban or rural school
A (PA)	Male	29	994	Urban
B (PB)	Male	33	888	Urban
C (PC)	Male	34	145	Urban
D (PD)	Female	23	1 321	Urban

Key: PA, Participant A; PB, Participant B; PC, Participant C; PD, Participant D.

what all participants have in common as they experience a phenomenon (Nieuwenhuis 2016).

■ Population and sample

In this study, four school principals were purposefully selected. The rationale behind purposive sampling is to select participants with the purpose of answering the research question the best (Creswell 2012). The profile of the four participants is presented in Table 5.1.

■ Data collection

The data collected employed semi-structured interviews and field notes during face-to-face interviews that lasted one to two hours while the principals eagerly discussed their entrepreneurial activities. It was, therefore, not necessary to probe them to collect data. After recording the interviews on an audio recorder, the principals permitted the researchers to tour the schools' premises whilst guiding them through the classrooms, locker rooms, and school grounds. The principals clearly seemed very proud of their schools. During the tour, additional data could have been collected, but the principals gave useful information about their entrepreneurial leadership, especially regarding their future plans for the school. They also granted permission to take digital photographs of the schools. During the interviews and the tours of the schools, all participants adhered to the COVID-19 pandemic safety protocols.

■ Data analysis

The data were analysed by following the following steps provided by Leedy and Ormrod (2013): organisation of details about the case, categorisation of data, interpretation of single instances, identification of patterns, and synthesis and generalisations. The recorded interviews were transcribed, and after scrutinising the content of the written interviews, codes, categories and themes were identified. The audio recordings reflected the viewpoints of the participants, and the data were substantiated via verbatim quotations. The data analysis goes hand in hand with trustworthiness, which was applied by ensuring credibility (accurate clarification of participants' perspectives), transferability (context-bound and setting), dependability (more than one research technique applied) and conformability (objectivity and neutrality of data).

■ Ethical considerations

The necessary ethical guidelines were followed. Permission to conduct the research was given by the provincial education department of Gauteng and the Research Ethics Committee of NWU. The participants signed an informed consent form. The ethical issues, including their voluntary participation and the fact that they could withdraw at any time, were explained to the participants. Confidentiality and anonymity in participation were ensured. It was also ensured that the participants and the schools would not be harmed during the research process.

■ Discussion and findings of the research

The positive leadership behaviours and attitudes of entrepreneurial leaders as postulated in the social exchange theory became evident during the data analysis. Specific characteristics and behaviours of entrepreneurial school leaders that were identified in the conceptual-theoretical framework manifested themselves (cf. Nastase, Dobrea & Valimareanu 2016:5). The lessons taught by the social exchange theory about voluntary behaviour that shows motivation to pursue innovation permeated the data that emerged from the analysis. These characteristics include strategic thinking and visioning, team building, personnel management and development, communication and negotiation skills and the mobilisation and optimisation of financial resources. In addition, Esmer and Dayi (2017) list a few dimensions that are related to entrepreneurial leadership. Concepts such as risk-taking, proactive, visionary, innovative, willing to experiment, charismatic and creative are associated with traits of entrepreneurial leadership. Ordu (2020) adds a few more traits, such as locus of control and the need for achievement. When scrutinising the data, it was notable how many of these characteristics, behaviours, dimensions and traits came to the fore in the transcriptions. The following section is a discussion of the results. Firstly, a contextual description of each school is given. Thereafter, the themes are discussed.

■ School A

□ Contextual description

The school is about 68 years old and is in an average socio-economic urban neighbourhood. Although the school is very old, the building is in very good condition, and a great deal of renovation has been done. This school was remarkable because it was very quiet and neat. A sense of discipline was apparent. This feeling was reinforced during the tour of the school, as there were no learners walking around the school grounds and the learners greeted politely during visits to the classes. The school grounds were very neat, and all the improvements were pointed out. Not only did the principal put a great

deal of effort into the school grounds, but it was also very nicely beautified and maintained. Given the fact that the parent community is a middle-class income group, it was surprising to notice all the improvements. The principal made it clear that the parents were 100% part of the school, informed of all upgrades, and supported the principal.

□ **Theme 1: Profile of entrepreneurial school leader**

Charisma surrounds Participant A. He speaks with confidence and authority and does not hesitate to state things pertinently. It was clear that his presence would attract followers who would share his vision. For him, entrepreneurial leadership means progress and getting out of one's comfort zone. Therefore, a clear vision is needed. The vision is connected to a need for achievement. This is in line with Esmeri and Dayi's (2017) suggestion that entrepreneurial leaders should have skills to reach high standards. Participant A's vision is to build an outstanding school in an average socio-economic environment. According to him, there is no reason why this is not possible. He emphasised that the word 'but' did not exist in his vocabulary: 'Your word must be your word, whether right or wrong, no grey areas.'

In order to have an outstanding school, Participant A acts like a businessman and asks the question: which shareholders will send the school to higher heights? For this reason, he selects the learners who enrol in his school not on the basis of race, wealth or achievement but on the basis of what the learner can do for the school, even if it is only a small contribution. Participant A is dynamic, strict and clearly takes the lead in many areas. Yet he believes that there should be love and a sense of togetherness at the school. He argues that the community should 'believe in you'. The moment the community believes in the principal as a human being, they are willing to take their side. Trust is therefore very important, something that Participant A successfully creates and maintains.

A second characteristic that came to the fore is the fact that Participant A acts proactively. According to him, all the stakeholders (teachers, parents and governing body) must buy into decisions. He explained:

'The only way to get them on board is to co-opt people before the current governing body's term expires. That way, they become part of how things work with the governing body. Then they understand your decisions and plans. You save time by not explaining everything again in advance.' (Principal, male, 29 years' experience, school: middle-income suburban, affluent parents)

According to Participant A, one must be surrounded by experts: 'There is no point in struggling while there are knowledgeable people in your community'. He strongly believes that one should plough back into the community. Therefore, he will use some people in his community to help the school on various levels, whether it is legal aid or construction work on the site. For him, it is all about expertise in a specific area. This trait, which is actually delegation, is typical of an entrepreneur and is applied with great success by the participant.

Participant A argues that any entrepreneurial leader should be creative and innovative, and he acknowledges that many ideas come from his side. However, it is also important that the governing body should be innovative so that the members can join hands and carry out projects. They take risks, experiment, and then decide what works and does not. An extremely important aspect is that everyone in the school should be recognised as ‘part of the school’. For him, it is about empowering, acknowledging and uplifting people. He explained:

‘I trust my workers. [*Petrus*] is in charge of the garden. I allow him to take his own initiative so that he can be proud of his domain. Then I post a picture of him at the garden and write that he is in charge of the part of the school. It is then posted on the website and people can comment. This shows that you care and that everyone is important, whether you are a teacher or one of the workers on the school grounds.’ (Principal A, male, 29 years’ experience, school: middle-income suburban, affluent parents)

Participant A’s file system was striking. At first glance, the researchers noted all the years’ files; all were labelled precisely the same. He explained that he knew all the everyday occurrences: ‘All information is available in the files. No teacher has reason to ask about this or that. It’s all there, go read it’ (Principal A, male, 29 years’ experience, school: middle-income suburban, affluent parents).

It was clear that Participant A’s school was running like a well-oiled machine. At the helm is the principal, who runs his school like a business.

□ **Theme 2: Innovative ideas**

Typical of an entrepreneur, Participant A thinks in rands and cents. When asked what he did as an entrepreneurial leader to raise finances, he explained his inventive plan. It is noteworthy that he did not want to keep the plan to himself but also wanted to introduce it to other schools so that they could also make a profit. He said: ‘This project by me and the governing body can also benefit other schools. That way, I make the schools around me stronger, and the community gets better.’ His project involves a simple buy-and-sell initiative. Participant A further explained that a trust should definitely be part of a school’s finances:

‘All profits are poured into the trust. I then use that money to do other developments. The school is stupidly built, but I saw the potential to put all the sports facilities in one area. I got some of my community’s people to help me with that, not contractors.’ (Principal, male, 29 years’ experience, school: middle-income suburban, affluent parents)

Another initiative was to upgrade the nursery school. ‘The kindergarten is my incubator. If it’s going well there, it’s going well with the whole school up to Grade 7’, he said.

Looking at Pashiardis and Savvide's (2011) statement about how the creative use of resources is essential, it is clear that Participant A is investing in the 'right things'. It is not always about finances but how the school and community can be developed into a bigger and better school and community. Development means progress – something that the participant lives out.

□ **Theme 3: Clarity, consistency and control**

It is no secret that clarity, consistency and control play a huge role in any business. These three concepts are also applicable to a school setting, especially a school with an entrepreneurial school leader. According to Participant A, transparency is extremely important, and he therefore uses all forms of communication – Twitter, WhatsApp, Facebook and the website of the school, to name a few. That way, he can ensure that everything that happens in the school is visible 'out there'. This is in line with the remark of Pashiardis and Savvide (2011) that networking is of utmost importance. What Participant A says he is going to do, he does, and it can be seen on social media. Being transparent creates trust. So new projects are not questioned, and the parents know that these will be to the benefit of their children.

Furthermore, it is important that he, as the principal, must at all times be consistent. What applies to one learner, teacher or worker must apply to the next learner, teacher or worker. Participant A remarked:

'The governing body should be in the background and not put their own gain first. I do not allow the members of my governing body around the school grounds. They need to book in like any other parent.' (Principal, male, 29 years' experience, school: middle-income suburban, affluent parents)

Annual feedback from the staff and parents shows that Participant A succeeds in his consistent actions, as it was one of the points that the staff and parents pointed out as positive.

When it comes to control, delegation and trust are important. As the principal, he cannot control everything. Therefore, people that he can trust to apply control are appointed. At the same time, it serves as training for the staff. What is important, however, is that one must admit if one has made a mistake. Only then can an error be corrected.

A business is as good as its workers. In this regard, Participant A commented: 'You are as strong as your staff. You have to be the wind in your staff's wings and then you will be able to fly'. (Principal, male, 29 years' experience, school: middle-income suburban, affluent parents)

Participant A succeeds as an entrepreneurial leader. Looking at the general entrepreneurial characteristics, Participant A adheres to all the characteristics as explained in the literature. He is capable in the three main areas, namely, leading self, leading others and leading a business (school). The

characteristics of confidence, self-awareness, understanding and committing to life goals, integrity, managing and motivating subordinates, developing subordinates, team management or development, executing and operational management, innovation, creativity and entrepreneurship, functional knowledge, and gathering information and insight are second nature to him.

■ School B

□ Contextual description

The school is about 86-years-old but looks neat and clean. Some renovations have been made, and the cloakrooms are extremely modern. The school is in a community that has changed a great deal. A type of 'migration' has taken place, and the dynamics of the school have changed as a result. The rules regarding the placement of learners have changed considerably in recent years. As a result, many foreigners place their children in the school, possibly because of the strong sporting opportunities offered there. The problem is that these learners do not live in the area. The further problem is that the learners from the immediate area often do not get a place in the school and then have to go to other schools, which implies transport implications. The socio-economic condition of the neighbourhood is average.

□ *Theme 1: Profile of an entrepreneurial leader*

In contrast to Participant A, Participant B is much more neutral with respect to entrepreneurial leadership. According to him, he had to attend a course where cooperative management and how cooperative management could be applied in schools were presented to him as a principal. His remark with regard to this was: 'Principals are principals, and now they suddenly have to be a company.' (Principal, male, 33 years' experience, school: middle-income suburban, affluent parents)

It is clear that not all of the typical entrepreneurial characteristics are present in this principal. His entrepreneurial leadership is more 'laid-back'. According to him, initiatives have to come from the staff members and management team. He encourages them to think creatively, but in the same breath, he also mentioned that if they came up with a proposal, they should try to get funding for it themselves. Looking at the characteristics of an entrepreneurial leader, one can see this as an opportunity to develop the staff. It can also be attributed to his nature of impatience: 'I'm in too much of a hurry; I cannot wait for someone for a week or two.'

However, he is approachable and stated in this regard: 'I'm open to new ideas, listening to everyone's suggestions - the time of "master" is long gone'. This comment agrees with the statement of Currie et al. (2008) that all stakeholders must be brought on board. In addition, Participant B felt strongly

about decision-making and commented: 'Indecision bothers me a lot. One can always say after the time that it may not have been the right decision, but at least something was done. Do something!'

From the interview, it can be deduced that Participant B has a will of his own and does not want to be prescribed. In this regard, he explained: '[The] governing body should not tell me how to run my school. Nowadays, the new governing body thinks they are in control.'

When looking at the above discussion, it is clear that Participant B knows exactly what he wants. Although it is not necessarily a typical characteristic of an entrepreneurial leader, Participant B still thinks and acts like an entrepreneurial leader. One could say that entrepreneurial leadership can be viewed from a different angle. From his point of view of 'nice to have but what is necessary?', he has a definite opinion on how the finances of the school should be managed. According to Participant B, a school should have no debt and only use cash, because debt causes interest to be added and it takes more money out of school. Therefore, he first worked off the debt that the school had and then started working with cash. He put it this way:

'I do not believe in any service contract – only do repairs when something breaks. When something breaks, like through lightning, the insurance covers it. Why, then, should you have a contract of service while nothing breaks? This helped a lot during COVID-19. Now I put all that extra money into an investment and use it to improve the school, like the cloakrooms we upgraded and the van we bought.' (Principal, male, 33 years' experience, school: middle-income suburban, affluent parents)

It is clear that Participant B is firm in what he believes in. This trait can benefit entrepreneurial initiatives. Not only does he think logically, but he also sees the benefit of his decisions as positive in difficult circumstances. One of the characteristics that emerged most strongly was delegation. It is clear that he trusts the people to whom he has delegated specific responsibilities. For example, non-payment of school fees is handled by a specific person at the school; therefore, there are no extra legal costs. Again, it shows an ingenious decision to save money.

□ **Theme 2: Innovative ideas**

When it comes to innovative ideas, it is clear that Participant B has specific projects in place that contribute to the finances of the school annually. However, the COVID-19 pandemic completely overturned his plans, and he had to think of new initiatives. Pihie, Bagheri and Asimiran (2014b) argue that principals need to rise above problems, difficult times and crises. This was exactly what Participant B did. A simple yet inventive proposal from the management team and teachers initially made him think that the initiative would not work, as his school represented a diverse group of people, but the project was so successful that he proposed it to other schools as well. The

crux of the matter is that he knew how to persuade the community to get involved in the project. Typical of the culture of his community, he had to apply transactional leadership to strengthen his entrepreneurial leadership. For him, it is important that any initiative must fit within the framework of the community, but at the same time, he has to know the parents. He explained:

‘Parents are funny. When they see that things are going well, their hands are open. Therefore, you need to have a good relationship with parents. When there is renewal, they must see it. For the community, it is about what opportunities the renewal will provide for their children.’ (Principal, male, 33 years’ experience, school: middle-income suburban, affluent parents)

It is clear that Participant B has a good knowledge of the composition of his community, and according to that, he carries out his entrepreneurial leadership. Every initiative should be meaningful and not a waste of time.

□ **Theme 3: Clarity, consistency and control**

For Participant B, clarity is of the utmost importance. ‘Available and visible, it’s very important’, he remarked. Clarity not only applies to visibility, but clarity in all areas makes or breaks a school. It begins by clearly outlining to everyone their powers and duties. Then the other important things follow:

‘First of all, everyone has to buy into the idea; it has to be clear to everyone what you are going for and what you want to achieve. Everyone needs to know exactly where he stands, what his boundaries are [...] do not come looking for forms from me; you need to know where they are.’ (Principal, male, 33 years’ experience, school: middle-income suburban, affluent parents)

The next important trait, according to Participant B, is that one has to have a passion for something, otherwise it is not going to work. What one does, one has to do thoroughly.

Regarding consistency, Participant B made no distinction and said: ‘Whether you are grand or not, rich or not, we run a business’. Furthermore, the staff needs to know where they stand with him. He feels strongly that one should not be a pleaser because then one is inconsistent. One must be the same every day, keep personal problems away from school and empower people with knowledge.

According to Participant B, control is the biggest problem in education. There are many policies, but the control in terms of policy remains behind. According to him, it does not help if there is a job title, but the work is not done. He delegates work in such a way that it complies with the job title. To build a business, one has to delegate. For this reason, he delegates a great deal in terms of control because it provides an opportunity to empower people. A business is as strong as its workers, and the same goes for schools. Participant B believes in random control. He walks through the school and peeks into the classes. That way, he keeps the teachers ‘on their toes’. He will direct inquiries to the financial officer in passing.

For him, however, it is important to be honest about control. He remarked: 'People sometimes write pretty well to please people, but then the controls are not true. So what is the use of control?'

The three aspects of clarity, consistency and control, which are strongly related to businesses, emerge just as strongly in the school of Participant B. Although Participant B does not seem to have such pertinent entrepreneurial leadership traits, it is clear that he acts like an entrepreneurial leader would act, applies entrepreneurial thinking and successfully executes entrepreneurial initiatives.

■ School C

□ Contextual description

The school is about 70-years-old. In general, the socio-economic situation of the area in which the school is located is not very good. There are many problems in the area; however, the learners experience and view the school as a safe haven. Striking is the strong security at the school. Still, it could be seen that the learners were happy and cheerful. There was a clear distinction between the first building and the new sections that had been added. In the original building, it was as if time had stood still, and the idea emerged that no unnecessary money was spent on decor. However, in the Foundation Phase classes, it could be seen that much effort had been made to provide the classes with good equipment.

□ *Theme 1: Profile of an entrepreneurial leader*

When asked how Participant C saw his entrepreneurial leadership, his answer was surprising: 'I never thought I would think like an entrepreneur.' According to Participant C, the old dispensation had a very strong structure, and the emphasis had shifted to getting one's own funding. He has had to learn entrepreneurial leadership. Thinking about the typical entrepreneurial traits, it is clear that Participant C is only a principal with the interests of the learners, teachers and parents at heart. Instead of exercising entrepreneurial leadership, it is more important for him to carry out the day-to-day duties and responsibilities of his role as principal. However, he is not apathetic towards entrepreneurial leadership. When it comes to entrepreneurial leadership, it is important for him to think 'outside the box'. The statement of Participant C that one's own initiative and creative thinking are important resonates well with De la Rey's (2018) statement about visionary thinking. In line with this, there must be a strong management team, and the competence of the governing body should be utilised. For entrepreneurial leadership to work, everyone must work together as a team. Participant C's calmness was immediately noticeable. It was therefore no surprise when he remarked:

‘Many expect me to give an immediate answer. I believe that one must first weigh everything. Unfortunately, the new generation wants an answer right away. The new generation wants to be part of everything and knows everything, but experience does not come from academic qualifications.’ (Principal, male, 34 years’ experience, school: low-income suburban, affluent parents)

Participant C believes in a sixth sense and will often consider ideas using his sixth sense.

□ **Theme 2: Innovative ideas**

Typical of his quiet disposition, Participant C does not think of ways to supplement funding. What is important, however, is that he quickly sees the opportunity for funding. It is as if his entrepreneurial leadership then comes to the fore. It is around this trait that Participant C was exposed to an opportunity to act as an entrepreneur during an informal event. The main focus was not on the product, which was for free, but on how he saw the opportunity to do something with the product – an entrepreneurial opportunity. In his case, it was not just about the product (fruit) but about how the product could also benefit the learners’ health. He used the product to make a profit from it, and just like the other two principals, he also shared the idea with other principals. The innovative idea of Participant C fits in well with the statement of Rahim et al. (2015) that an entrepreneurial leader is an innovator that generates and takes advantage of opportunities.

□ **Theme 3: Clarity, consistency and control**

Clarity, as one of the aspects of successful businesses, was extremely important to Participant C, who stated: ‘People need to be kept informed.’ Some information must be withheld and other given immediately. According to Participant C, it is extremely important that people trust the principal, but at the same time, the principal has to trust people. Principals are representatives of the DBE. ‘I stand in the middle. Sometimes I hear about stuff in media but have to wait for the Department. This is where clarity plays such an important role’, he said.

Participant C is guided by legislation and what the DBE prescribes. He uses these two guidelines as a foundation for clarity. Moreover, he sees delegation as in-service training. Regarding control, he replied:

‘There must be mutual trust in all the processes. I trust my staff as professionals but there are still experience levels that differ, and therefore, I have to exercise control. Delegation is important. In this regard, I have to rely on my management team, HoDs and deputy heads.’ (Principal, male, 34 years’ experience, school: low-income suburban, affluent parents)

It is clear that Participant C is not a prominent entrepreneurial leader in terms of the typical characteristics of entrepreneurial leaders. However, his strength is his ability to think creatively.

■ School D

□ Contextual description

The school is about 117-years-old. At first glance, the school looked good, but the inside of the school was a very different picture. A great deal of effort has been put into giving the entrance hall and the principal's office a sense of 'welcome'. Striking is also the 'hand of a woman' in this school – neat and beautiful. The school is characterised by a combination of socio-economic conditions. On the one hand, there are learners who come from very poor socio-economic circumstances and rely on the school's sandwich project. Then, on the other hand, there are learners from average socio-economic circumstances and even some learners who come from very wealthy families.

Much research has been conducted on females as principals, and many stereotypes have emerged. Strikingly, the principal of this school has very strong leadership qualities, and it is clear that the principal is not intimidated by wealthy parents or anyone else.

□ *Theme 1: Profile of entrepreneurial leader*

Looking at the characteristics of an entrepreneurial leader, Participant D adheres to all of these. Where the other participants used words for entrepreneurial leadership such as 'thinking outside the box', 'progress' and 'paradigm shift', the crux of entrepreneurial leadership for Participant D lies in 'job creation'. Her entrepreneurial thinking started from an early age when she wondered how one could sell something. She already saw an opportunity in every event as a child. As an adult, she reasons: 'If we do something, can we not help more people? If one can get money out of it, even better.' For her, every entrepreneurial decision must fall within the world of experience of the staff and parents. She believes in thinking big and taking on bigger rather than smaller projects. She links this decision to her experience that parents do not like fundraising projects.

It is clear that Participant D is very creative and thinks further, especially with regard to long-term plans. Innovative ideas originate from her, and sometimes she has to struggle to convince the governing body that her initiative will benefit the school. The fact that she gives her young staff the opportunity to take initiative and develop is obvious. She notes the following regarding the transition to online classes during the COVID-19 pandemic:

'The young staff handled online very well. The youngsters trained the older people, and everyone enjoyed it very much. The feedback was very good. Suddenly, the older staff were no longer afraid of online classes and the youngsters flourished.' (Principal, female, 23 years' experience, school: middle-income suburban, affluent parents)

This is a typical example of how she gives space to her staff members in order to raise the standard of the school. One of Participant D's entrepreneurial

qualities is that she can quickly identify a gap. In this regard, she noted that the after-school centre had a great deal of potential to provide better services, which could also earn an extra income. She upgraded the facilities through the school's trust and ran the after-school centre like a small business. She applied the same principle to the preschool facility and showed a very good profit every year. Traits such as risk-taking, being proactive and having experimental ideas are second nature to her. She admitted that she demanded her 'pound of meat' but justified it by referring to the fact that education was a professional career and that staff members earned a salary, and therefore, the standard must be high. That is why she does not hesitate to inform people if a staff member has made a mistake. According to Kinlin (2012), a visionary leader applies forward thinking and communicates a sense of purpose. Participant D complies with this statement.

□ **Theme 2: Innovative ideas**

The entrepreneurial initiative that Participant D brought to the fore arose as a result of political interference. She commented:

'Parents are ignorant and uninformed. Parents criticise me without first investigating the true facts. Then incidents on Facebook are ripped out of context, and the misperception escalates.' (Principal, female, 23 years' experience, school: middle-income suburban, affluent parents)

She turned the political incident into an opportunity to make a huge difference in the school and the community. Not only will the initiative be managed as a business, but it will offer many learners the opportunity to be taught in their mother tongue. Instead of putting more pressure on her staff, the initiative will create more jobs and, at the same time, leave a legacy that will perpetuate the name of the school because it will be two schools under the banner of one school's name. She is in the process of bringing the initiative off the ground and keeping the parents informed.

□ **Theme 3: Clarity, consistency and control**

For Participant D, it is important that very clear guidelines are passed on, as information is sometimes lost during the transmission of information. However, it is important for her to accommodate all brain profiles. She said:

'For some, you need to explain exactly what is expected, point by point, and then often repeat it more than once. Then there are others who want more visual representations of the guidelines. In the end, it's about everyone clearly understanding the assignment.' (Principal, female, 23 years' experience, school: middle-income suburban, affluent parents)

It is important for Participant D that she understands each staff member. With regard to consistency, it is very important that all staff members are treated exactly the same: 'They keep track of what I said, what and when.' From this,

it can be deduced that Participant D often has to consider her words before she discusses a matter with the staff members. She does not hesitate to act consistently when it comes to work. She explained:

‘Deadlines are of utmost importance because education is a professional profession. Dishonesty is completely out of the question. People have been fired by me for poor work ethic.’ (Principal, female, 23 years’ experience, school: middle-income suburban, affluent parents)

Unfortunately, this creates fear, but for her, it is about how the learners are treated, and it cannot be allowed for learners to be harmed. ‘It makes one popular but also unpopular’, she said.

Control is about delegation and trust, but Participant D believes in still following up on tasks. That way, she stays informed and eliminates unnecessary mistakes. She is a proponent of the complete division of labour: ‘I only say once how, what and when should happen’. Control over time is of the utmost importance: ‘When something is forgotten, we add it for next year so new people know what to do. We do not make the same mistake twice’. Participant D also oversees work she has delegated, ‘[j]ust to encourage and motivate them too’. She checks the staff about whom she feels comfortable and double-checks people about whom she is unsure.

It is clear that Participant D has all the characteristics of an entrepreneurial leader. It is also clear that she knows exactly what she wants and encourages her followers to achieve the same goal. This remarkable woman is truly an entrepreneur par excellence.

■ Findings

In this study, it was found that some participants possessed natural entrepreneurial leadership. For others, it was an adjustment to think like an entrepreneur. What is important, however, is that none of the participants hesitated to act as entrepreneurs in times of crisis. The emphasis is therefore on *leadership*. It was also striking how the participants had either adapted their everyday leadership styles to act as entrepreneurial leaders or combined their leadership styles with the entrepreneurial leadership style. As for innovative ideas, it was clear that some participants had long-term ideas and others had short-term ideas. The fact is that everyone did have innovative ideas. In order to bring an idea to fruition, it is important that everyone is involved in the execution of the idea. In this study, it was found that the pandemic had brought the teachers, principals and community closer together, and all of them together made an effort to keep the school functioning. Whether it was a big or small effort, the collaboration was there. When comparing this finding with the definition of entrepreneurial leadership (cf. Pashiardis 2014), it was clear that the participants succeeded in fostering

positive relationships with all stakeholders, fulfilling the vision of the school and going beyond the common measures to act as entrepreneurial leaders to keep the schools going.

In this study, it was also clear that the participants had a need for free rein to exercise entrepreneurial leadership but were limited by the legislation of the DBE. According to Levin (2003), decentralisation requires an understanding of the business model as well as the education model. For this reason, school principals must follow an entrepreneurial leadership style to enhance school performance. The participants understood the principle of entrepreneurship and did an excellent job in the midst of many uncertainties.

No initiative can be carried out without clarity, consistency and control. All of the participants felt strongly about the three aspects, and this explains why their entrepreneurial initiatives, without exception, were successful. Although De la Rey (2018) points out a lack of effective school management and leadership because of a lack of training in some schools, the opposite was found in this study. It was clear that the participants had qualified themselves to act as entrepreneurial leaders, either through workshops or by conducting research. The core idea is that people should not wait until training is provided to them but should expose themselves to ways of training themselves in a new direction. Entrepreneurial leadership is a field that needs to be developed in education. The willingness is there, but more exposure is needed.

■ Conclusion

In this chapter, it was argued that entrepreneurial leadership is an ideal leadership style to enable school leaders to lead their schools innovatively towards improvement during uncertain times. Using the lens of the social exchange theory and the qualities, characteristics, drivers and competence areas of entrepreneurial leadership, findings that were consistent with what had been revealed in the literature were revealed. The profiles of the participants show that they are school leaders who epitomise the key tenets of entrepreneurial leadership. The innovative ideas of these school leaders show that they embody the qualities of being innovative, proactive and risk-takers. Another key finding of the study was an insistence on clarity, consistency and control by school leaders. The implications of these findings are that entrepreneurial leadership can be recommended as a suitable form of leadership to turn schools around in uncertain times. The adoption of this leadership style can contribute to the improvement of the quality of school leadership. The improvement of schools and the quality of school leadership is one of the strategic goals of the DBE that can be achieved with the practice of entrepreneurial leadership.

Using and maintaining ageing school facilities in Gauteng: Perceptions of school staff and school governing bodies

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■ Abstract

Many researchers have a fast-growing concern regarding the threats to education posed by ageing school facilities. Uline and Tschannen-Moran (2008) assert that substandard buildings, such as uncomfortable and dilapidated school buildings, demotivate and demoralise educators and learners alike while simultaneously creating lackadaisical community participation in school. This means that a healthy school environment is critical for effective teaching and learning and contributes to the development of children as skilled and productive members of the community. This chapter reports on a qualitative study conducted with two focus groups. The main finding was that the safety of educators and learners in ageing school facilities

How to cite: Nhlapo, VA 2022, 'Using and maintaining ageing school facilities in Gauteng: Perceptions of school staff and school governing bodies', in L. van Jaarsveld, CC Wolhuter & CP van der Vyver (eds.), *Education Leadership: Scoping, perspectives and future trajectory*, AOSIS Books, Cape Town, pp. 97-117. <https://doi.org/10.4102/aosis.2022.BK383.06>

was compromised. For this reason, the study sought to understand the perceptions of school staff and school governing bodies on using and maintaining ageing school facilities in Gauteng.

■ Introduction

Ageing school facilities are a major threat to the integrity of the provisioning of quality education in the 21st century. Research has indicated that effective teaching and learning cannot take place in an environment that poses a threat to educators and learners (Rufai, Umar & Idris 2013). According to the DBE (2018), education is a basic right:

[H]as to be provided in conducive, decent, safe and accessible education facilities that are located in environments or neighbourhoods that are conducive, supportive, complementary and ideal for teaching and learning activities. (p. 11)

The preceding argument is in accordance with the provisions of Section 10 of the *Constitution of the Republic of South Africa* (1996, n.p.), which states that 'everyone has inherent dignity and the right to have their dignity respected and protected'. The DBE (2018) further asserts that this dignity relates directly to the quality of the school facilities that need to be provisioned whereby pedagogical undertakings would uninterruptedly take place. That is, classrooms, laboratories and all other teaching-learning spaces, boarding facilities for learners, as well as administrative services. So, with the stipulations in Goal 24 of the *Action Plan 2014 - Towards the Realisation of Schooling 2025*, the DBE (2010:4) aims to 'ensure that the physical infrastructure and environment of every school inspire 'learners to want to come to school and learn, and teachers to teach'.

However, there is a growing concern about the threats that ageing school facilities pose to the well-being of educators and learners in schools (Ajibola 2009). According to Uline and Tschannen-Moran (2008):

Dilapidated, crowded or uncomfortable school buildings lead to low morale and reduced effort on the part of educators and learners alike, to reduced community engagement with a school and even to less positive forms of school leadership. (p. 60)

For this reason, this chapter sought to explore the perceptions of principals, educators and school governing bodies (SGBs) on their continued use of ageing school facilities in Gauteng, South Africa.

■ International policy frameworks on the provision of quality education environments

The SDGs approved by the leadership of the United Nations member states at their 70th meeting of the United Nations General Assembly in September of 2015 established an agenda for global transformation. To this end, the SDGs were defined by the United Nations and scoped the development agenda for

all countries in the world, requiring countries to construct and revitalise education facilities that are user-friendly for every child, facilities that are sensitive to disability and gender, providing safe, violence-free, all-encompassing as well as effective learning environments for all (Barrett et al. 2019:v). Quality education was identified as key in the 17 fundamental SDGs (SDG4) and was intended to guarantee broad and impartial quality education as well as to endorse the principle of lifelong learning opportunities for all (UNESCO 2016). In addition, the 2030 agenda further placed education at the centre of the realisation of many of the other SDGs, such as Goal 3 on health and well-being. Therefore, SDG4 and its concomitant objectives set a determined programme that emphasised quality teaching and learning in educational institutions in conjunction with the more traditional indicators of access and participation. The OECD (2017, n.p.) that this poses a challenge to each and every country of the world, including South Africa, to develop its system of education and marks a noteworthy parting from ‘previous global education goals and targets, such as the Millennium Development Goals and Education for All’.

However, of key interest for this chapter is the review of the progress towards SDG4 on the provisioning of quality education. According to Webb et al. (2017), the OECD report, *Education at a Glance 2017*, indicates that there is still a plethora of educational challenges in all OECD member countries. The report further indicates that the objectives that other countries have partially achieved include school facilities and access to quality basic education (OECD 2017).

Ancho and Juan (2021) report that in 2019, the president of the Philippines signed the *Republic Act 11 194*, which:

[M]andates the preservation of the architectural, historical, and social significance of GSB (Gabaldon school buildings) [...] [which] have witnessed the daily lives of Filipino learners and educators as well as the quest for quality education in the country. (p. 106)

Furthermore, these school buildings, which were built more than a century ago, have high-pitch galvanised iron roofing and high ceilings to match the Philippines’ tropical climate. According to Honda et al. (2015), as these buildings are part of the long history of education in the Philippines, they deserve to be treated as a cultural heritage.

In South Africa, the DBE, as a measure of its statutory obligation to deliver quality education for all in the country, is committed to the establishment of a safe and secure learning environment for all learners (Marishane 2014). In order to create an environment of this nature, the DBE established a policy on school infrastructure referred to as the *National Education Policy for Equitable Provision of an Enabling Physical Teaching and Learning Environment*. The policy was drafted as a response to the international conventions, as alluded to above, on the basic rights of the children to education, legal and

constitutional obligations pertaining to the issues and the veracities of the South African national school infrastructure. In addition, the *Public Finance Management Act 1 of 1999* (South Africa 1999) supports the proper management and maintenance of public assets. According to Section 38(1)(d) of the *Public Finance Management Act* (South Africa 1999):

The accounting officer for a department, trading entity or constitutional institution is responsible for the management, including the safeguarding and the maintenance of the assets of the department, trading entity or constitutional institution. As a result, every department, trading entity or 10 constitutional institution needs an asset management system which is a base for proper planning and budgeting for maintenance. (n.p.)

To this end, it became evident that consideration was given to global studies that continuously show a beneficial relationship between the physical environment and the outcomes in which pedagogic activities occur.

The Ministry of National Education of the Republic of Indonesia promulgated *Regulation No. 24 of 2007*, which related to facilities and infrastructure for elementary schools. By doing so, the Ministry of Education of the Republic of Indonesia was, in a way, acknowledging the fact that school facilities and infrastructure were indispensable in the teaching and learning process (Elpina, Rusdinal & Gustituati 2021). In fact, the issue of school facilities and infrastructure is included and regulated in the *Law of the Republic of Indonesia 20 of 2003*. Furthermore, the school facilities and infrastructure standards are also regulated in the Republic of Indonesia Government Regulation No. 19 of 2005 concerning Chapter VII, Article 42, Paragraphs 1 and 2 of the National Education Standards, where the following declaration is made (Elpina et al. 2021):

Each academic unit is obliged to have facilities including furniture, educational equipment, books, and other learning resources, consumables, and equipment needed to support an orderly and continuous learning process and each academic unit includes land, classrooms, leadership rooms, teacher's rooms, library rooms, laboratory rooms, canteens, sports and worship places, playgrounds, recreation areas, and other spaces needed to support the learning process. (p. 157)

According to Nurhayati (2021), there is conformity with national education standards regarding facilities and infrastructure between *Ministerial Regulation No. 24 of 2007* and *Government Regulation No. 19 of 2005*.

■ The importance of a school facilities policy

A policy on school facilities is one of the numerous regulations that make up an education policy that regulates the establishment of physical infrastructure and investment in the physical facilities of schools (Stephen et al. 2020). According to the OECD (2013), a school facilities policy also entails establishments that supervise, monitor and evaluate schools. In addition, the policy covers aspects of school facilities such as support infrastructure

regulations, financial capitation, minimum facility requirements, standards of facilities design and guidelines for partnerships with the community and other stakeholders (Stephen et al. 2020). In fact, Stephen et al. (2020:187), argue that a school facilities policy is intended not only to standardise infrastructure practices in schools but also to ensure that school facilities are fit for purpose and conducive to teaching and learning, as well as other school activities. The policy also aims to advance the learning proficiencies of learners by setting standards for the physical facilities of schools. A study by Rivera (2018:16) shows that such policies are criticised, as the allocated budget for school facilities is ‘inadequate, inequitable, and inefficient’, hence the need to enhance these policies.

■ Effect of the quality of educational facilities on the quality of teaching and learning

The provision of good educational facilities is crucial to bringing education to the doorstep of all (Oluwadare & Julius 2011). Webster et al. (2008) add that the quality of an overall building is essential to workers, as their morale and psychological well-being at work need to be boosted. Asmar, Chokor and Srour (2014) conducted a study with a total of 320 occupants who took part in educational facilities occupant satisfaction surveys to investigate their satisfaction with the cleanliness and maintenance of the facilities they occupied, the indoor air quality, the space layout, thermal comfort, the furniture, acoustic quality, the level of lighting and water efficiency. In their study, they compared two schools. They found that the difference in the performance of educational facilities across the two schools was around 17%, which laid the foundation for a future study to explore the reasons behind this noticeable variation. Asmar et al. (2014) assert that in recognition of the impact of the performance of the educational facilities on the occupants, schools are increasingly interested in tracking the performance of their buildings. It can be concluded that there is an increasing state of awareness concerning educational facilities and the related effect thereof on the satisfaction, health and performance of the occupants of such facilities. For instance, according to Heschong (1999), several studies have investigated the factors that affect the satisfaction of the occupants of educational facilities and, consequently, their performance and grades.

Heschong’s (1999) study revealed that having daylight in classes improved the performance of students in Mathematics tests by 20% and reading literacy tests by 26%. Moreover, Heschong established that good views could enhance learner performance, whereas glare, direct sun penetration, poor ventilation and poor indoor air quality could worsen it. Furthermore, Suleman and Hussain (2014) confirm that learners perform well in a positive classroom atmosphere and an environment in which they feel safe, secure, cared for and involved.

As a result, good physical facilities should be provided to learners, as these would help improve the school's overall performance. In addition, the quality of the overall educational facility is essential to personnel, as their psychological well-being and morale in the workplace should also be supported (Webster et al. 2008). A favourable physical environment has a significant positive effect on the efficiency of any school and acts as a 'catalysing agent' to provide a direct way to achieving the predetermined objectives of a school. Whereas poor and inadequate facilities negatively affect the overall performance of educational institutions, sufficient facilities promote academic achievement and ensure that the overall institutional performance is strengthened (Suleman & Hussain 2014). However, according to Suleman and Hussain, old and unattractive school buildings, cracked classroom walls and floors, overcrowded classrooms and a lack of sufficient classrooms, ablution facilities, inadequate security system, clean drinking water, electricity supply, playgrounds and teaching staff, amongst other things, negatively affect academic achievement in educational institutions. Therefore, Hussain et al. (2012) conclude that academic achievement is closely linked to the availability of good educational facilities.

■ The effect of a deteriorating physical infrastructure on education

A significant number of studies have shown that many school systems, mostly those in high-poverty or urban areas, are overwhelmed by poorly planned infrastructure and decaying buildings that threaten learners' health, safety and learning chances (Mokaya 2013). Seemingly, good school facilities are an important precondition for learning, provided that other conditions that support a strong academic programme in the school are available (Mokaya 2013). To this end, a study conducted by Buckley, Schneider and Shang (2004) on the influence of school infrastructure on learner achievement and behaviour has established that academic achievement improves with good building conditions, levels of lighting, air quality and temperature. Furthermore, in a study conducted by Marsh and Kleitman (2002) on factors affecting learners' performance in schools in Canada, it has been confirmed that one cannot expect a high level of academic performance from learners where school buildings are substandard. It therefore becomes vividly clear that, as opposed to dilapidated school infrastructure, well-planned structures and a clean, quiet, safe, comfortable and healthy environment are important components of successful teaching and learning.

The SDGs, which are defined by the United Nations and scope the development agenda for all countries in the world, require countries to build and upgrade education facilities that are child, disability and gender sensitive and provide safe, nonviolent, inclusive and effective learning environments for all (Barrett et al. 2019).

Age-appropriate learning spaces that offer flexible learning opportunities that learners can adapt and personalise contribute to learners' progress in learning (Barrett et al. 2019). Threats to the safety of schools can come from both inside and outside the school buildings, and it is easy to imagine how distracting it would be for learners, teachers and parents if, for example, it was apparent that the structure might not withstand an earthquake or if its electrical wiring was exposed, its windows were broken, or its bathrooms were a source of contamination instead of being sanitary (Barrett et al. 2019). In addition, if school buildings are prone to be flooded by intensive rains, swept away by strong winds, exposed to hazardous materials or decaying for lack of maintenance, it would hinder both teaching and learning, making it harder to produce the level of academic results that would be possible in a safe and healthy building. Therefore, it can be surmised that investment in school infrastructure and the physical conditions for learning is not a luxury but a necessity.

■ Poor air quality

According to Kielb et al. (2015), poor air quality caused by deteriorating infrastructure is a primary source of health problems, with dampness causing many absences from school by both learners and educators. Poor ventilation enables particles, pollutants and allergens to accumulate inside school buildings, and inadequate air circulation increases respiratory infection transmission. The adverse effect hereof was established by Shendell et al. (2004) in a study of 409 classrooms in Idaho and Washington, in which they found that learner absenteeism jumped by 10%–20% in rooms with poor ventilation.

■ Thermal comfort

Classrooms need good air circulation to prevent excessive heat and moisture (Dağlı & Gençdal 2019). To ensure adequate sunlight, a minimum of 20% of the classroom space must be allocated to the window area. In addition, electrical or other power supplies are required for lighting purposes. Dağlı and Gençdal (2019:167) further state that classes should be appropriately 'shaded by direct sunlight, flash (direct light) and reflection (indirect light)'. Most importantly, schools should not be in a location that is characterised by excessive pollution or odours (waste bands, slaughterhouses, etc.). In their study, Brunner and Vincent (2018) have found that modern classrooms that are comfortable and safe are prerequisites for learners to be academically engaged.

■ The characteristics of facilities promoting learning

The provision of educational opportunities, specifically in basic education, has been an aim of investment by a number of countries across the globe

(Kapinga 2017). In doing so, the main determinants of quality education should be considered. According to Kapinga (2017), these determinants include, amongst other things, the provision of a learning environment conducive to teaching and learning that consists of school facilities such as buildings, sports grounds, perimeter fencing and sanitation facilities. All of these school facilities should be adequately provided for and managed (Ibrahim et al. 2016). To this end, it can be surmised that school facilities are one of the foundational educational requirements that must be maintained in terms of safety and quality. For instance, one of the objectives of a health-promoting school concept is 'to improve the social and physical environment of schools to strengthen their capacity as healthy settings for living, learning and working' (Report of a WHO Expert Committee on Comprehensive School Health Education and Promotion 1997). St Leger et al. (2010) concur by asserting that health-promoting schools adopt a whole-school approach that goes beyond learning and teaching in the classroom to encompass all aspects of the life of a school.

Ileoye (2015) claims that learners derive more satisfaction from education when functional toilets and urinals are available, flowers are planted at specific locations on the school premises, and there are good playgrounds and other attractive facilities for teaching and learning. However, the sad reality in South Africa is that the school facilities, especially in rural communities, have been substandard and have posed a crisis situation for many decades. According to Yates (2018, n.p.), historically, the South African government did not care 'about providing services for learners in rural and non-white communities'. After 27 years of democracy, the government has yet to remedy the deep-seated problems in education (Yates 2018).

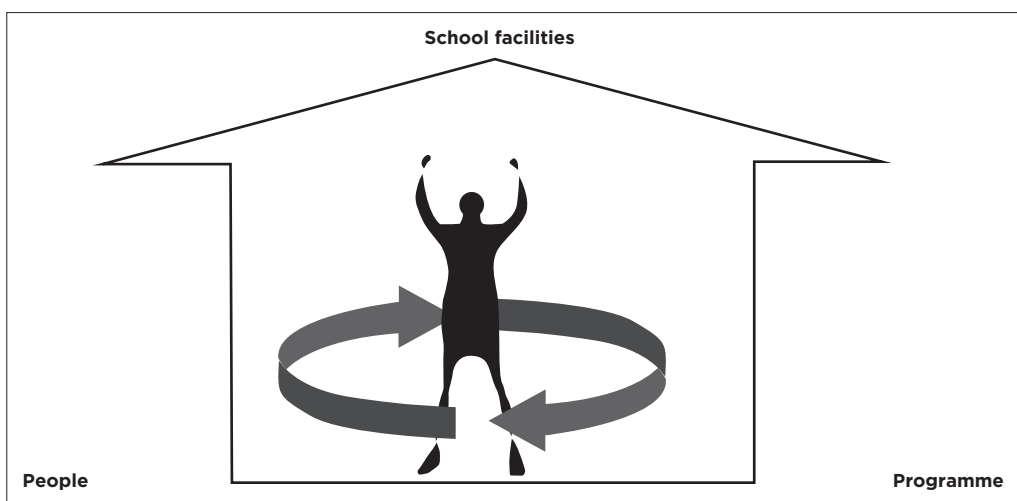
School size is another characteristic that is linked to learners' learning outcomes. According to Yunas (2014), there are more numerous and acute disciplinary problems in overcrowded classrooms. Learners' sense of belonging decreases when the size of a school is increased. According to Meier (1996), in schools with more than 400 learners, almost 30% of the learners have a sense of belonging, compared to smaller schools where nearly 70% have this feeling. Because of closer interaction and friendliness in smaller schools, the learners know and have respect for one another. However, the contact among learners in larger schools decreases, which creates problems in terms of discipline and consequently affects the teaching and learning process. Moreover, small schools are more accessible and less threatening for parents than larger schools.

Facilities, equipment and technology are the basic requirements for an efficient teaching and learning process. This implies that schools with proper infrastructure, staff and instructional support services are more reputable, which positively impacts their efficiency (Yunas 2014). For instance, a school building is argued to positively impact the safety, comfort and academic performance of the learners of that school.

■ Ways of measuring the quality of educational facilities

The quality of a school depends on the availability and utilisation of its facilities and addressing the learning needs of the learners (Yunas 2014). To this end, a school infrastructure performance indicator system has been developed for South Africa, which includes an appraisal of the national education policy and further suggests that any approach to school facilities has to take into account the pressing need to address backlogs in basic services, such as water and sanitation (Gibberd 2007). Embedded in this system, is the continuing requirement to improve the quality of educational facilities in all schools. According to Gibberd (2007), the integrated performance model that has been established endeavours to elaborate on these requirements by defining building performance in the following three areas (Figure 6.1):

- **School facilities:** The facilities should be able to perform well fundamentally. This includes ensuring that buildings are weatherproof, structurally sound and spatially and resource efficient, with low operating costs.
- **Programme:** The facilities should effectively support the activities that they are required to accommodate. For instance, school buildings should accommodate the current curriculum and the preferred modes of teaching and learning.
- **People:** The facilities should allow users to be comfortable, healthy and productive, meet users' basic needs and guarantee that human rights are respected.



Source: Gibberd (2007).

FIGURE 6.1: Integrated building performance model.

■ Technical, financial and educational responsibilities of maintenance of school facilities

According to the Financial and Fiscal Commission (2009:1), the fundamental purpose of a school is 'to promote equitable provision of an enabling school physical teaching and learning environment and a school in a dilapidated condition poses a challenge to the achievement of this goal'. Mojela and Thwala (2012) argue that for this reason, it is the joint responsibility of the government, ordinary people and policymakers around the globe to acknowledge the fact that the dilapidated state of the facilities of public schools can no longer be ignored. Notably, in their study, Mojela and Thwala (2012) found that the main problems faced by public schools in keeping their facilities in good condition are, inter alia, a lack of community involvement, a lack of financial control, vandalism, insufficient custodial staff, damage caused by learners, insufficient funds and a lack of accountability. In a statement by the Gauteng Department of Education (2014):

The National Education Infrastructure Management System (NEIMS) in Gauteng documented a significant deterioration in the condition of schools owing to poor and even no maintenance. It is therefore important to ensure that GDE continues to improve its maintenance programmes in a structured manner. (p. 5)

It can therefore be concluded that the Gauteng Department of Education is aware of the poor conditions of most of the old public schools in the province; hence, the department promises to ensure that each district and school receive training on a set of maintenance guidelines to be implemented in the 2014–2015 financial year.

■ The state of school facilities in South Africa

In South Africa, the policies of the apartheid era have left a legacy of enormous school infrastructure backlogs in previously disadvantaged communities, while the provision of facilities in formerly advantaged communities' schools appears relatively lavish, with schools having been provided with well-equipped laboratories and irrigated sports fields (Gibberd 2007). For instance, Equal Education (2010) reports that fewer than 8% of South African public schools have functional libraries. This chapter discusses the state of old schools in South Africa with regard to the current state of their libraries, ablution facilities, classrooms and perimeter fencing.

■ State of libraries

Regrettably, the South African government does not pay attention to the need for libraries in general and school libraries in particular. The NEIMS report of 2011 makes this fundamental challenge clear by indicating that across the

country, only 7% of the schools have a library with stock and another 13% have a library room available. In his observations during a study on the maintenance of school facilities, Nhlapo (2009) discovered that most school libraries in previously disadvantaged schools had been converted into classrooms, as there was a need for extra classrooms. The shelving in these libraries had been removed and the books stacked in boxes, not used at all. In addition, the provision of libraries retains the inequities of apartheid education. For instance, the vast majority of South African school libraries and school librarians exist within schools serving middle-class communities that are able to levy fees and raise funds for extra resources and educators in addition to the teacher-to-learner ratios set by the DBE (Hart 2014).

Furthermore, Hart (2014:3) finds it disappointing that the 1994 and 1995 White Papers on education included only one mention of school libraries and then only in terms of the physical provisioning of school buildings, describing them as an 'educationally necessary facility', together with laboratories and workshops. To this end, sadly, there is no national policy for school libraries that forces SGBs and principals to have libraries in their schools (Paton-Ash & Wilmot 2015). However, this problem is not unique to South Africa. Mojapelo (2018) asserts that most governments, especially those in poor and developing African countries:

[A]re hesitant to pledge themselves through a legislated school library policy to roll out an active and sustainable library and information service for their schools to improve the quality of education. (p. 410)

■ State of ablution facilities

Sanitation in school ablution facilities is often regarded as peripheral to the academic project, yet it significantly impacts productivity and the school experience (Evans, Bowman & Odgers 2020). The United Nations General Assembly (2015) recognises basic sanitation as a human right and emphasises the fact that substandard toilet environments create a fear of using such facilities, which, in turn, leads to associated physical and mental health problems (Chung et al. 2019). However, the condition of ablution facilities in South African public schools disregards the dignity of both educators and learners (Lekalakala 2018). For instance, ablution facilities without doors open up the possibility of rape, harassment and bullying in schools. On the other hand, if ablution facilities are safe and adequate, learners do not run the risk of falling ill and missing school (Nduvheni 2020). To this end, the condition of ablution facilities has become a matter of concern that has caused a great deal of ill feelings amongst learners, educators and parents (Norling et al. 2016). The ablution facilities in South African schools are described as dirty, unsafe and lacking proper hygiene measures to guarantee the elimination of health hazards (Vernon et al. 2003). Moreover, Jackson (2020) points out that many schools in South Africa still operate without safe and appropriate sanitation.

According to Norling et al. (2016), a value-added toilet environment is a cherished investment in ensuring that learners' right to adequate toilet facilities is respected and that they have the opportunity to manage their physical needs in a satisfactory manner.

Based on the arguments above, it is shocking to learn from the 2011 NEIMS report that of the 24 793 public schools in the country, over 10 000 still have pit toilets (DBE 2018). The fact that more than 20 years into the new democracy, some school children in South Africa are still not enjoying safe or hygienic places to perform the most basic of biological functions reveals that attaining acceptable sanitation in schools is not only a logistical challenge but, to a larger extent, a matter of education management at various levels. It requires understanding and commitment to the central role of sanitation in education and in safeguarding the dignity and human well-being. To this day, young learners in South Africa are still losing their lives after accidentally falling into pit latrines. Etheridge (2018) reports on one such incident:

Lumka Mketwa, the five-year-old girl who drowned in a pit latrine at an Eastern Cape school on 12 March 2021, has prompted a renewed uproar about the state of school toilets, a little over four years since Michael Komape suffered the same fate a week after starting school in Limpopo. (n.p.)

This incident prompted President Cyril Ramaphosa to react by commanding Angie Motshekga, minister of Basic Education, to conduct an urgent audit of unsafe structures at schools – ablution facilities in particular – and to come up with a plan to fix them within three months (Matthews 2018).

According to the NEIMS report for January 2018, 8 702 schools countrywide still have pit latrines. These pit latrines are not allowed at schools in South Africa, as stated in the *Norms and Standards for School Infrastructure Regulations*, published in November 2013. Although most of these schools have other types of toilet systems, out of the 5 393 schools in the Eastern Cape, 1 426 have only pit latrines, while 37 are reported to have no sanitation facilities at all. The government promised the citizens of South Africa more than 20 years ago that in a very short time, no pit toilets would be used by learners and educators in the country anymore. However, media reports continue to show that these toilets have not yet been removed. In many township schools in Gauteng, toilets are deliberately damaged, broken and vandalised by learners. Also, the maintenance staff at schools are not taking good care of toilets, and litter is thrown into toilets. The condition of some toilets may look good, but upon closer inspection, a lack of proper maintenance is evident. Such toilets paint a very bad picture of the management of schools.

■ State of classrooms in South Africa

The capacity for teaching and learning and learner performance depends not only on personal factors, such as motivation, psychological condition

and intelligence, but also on the physical conditions of the space that learners occupy (Gustafsson & Patel 2008). Therefore, it is inevitable that the conditions of the physical environment are supervised, and specific values must be ensured to establish healthy communication in the classroom. In case these conditions are not provided for, the learners will experience negative physical, physiological and psychological effects, such as difficulty in understanding, perception errors, being easily distracted or fatigued, frequent sickness, nervousness and headaches (Ünver 2015). This could imply that the necessary conditions for comfort in terms of light, heat, noise and so forth have to be provided for in all buildings. Hence, in order to provide complete, accurate, tireless and effortless teaching and learning, good visual comfort has to be provided in terms of light and lighting, which are essential elements of the physical environment of a school. Furthermore, the lighting design in classrooms should be such that it enables the learners and members of staff to carry out their duties in a conducive, comfortable and safe manner. When that is the case, education will be able to provide the knowledge and skills required for human capital development in South Africa.

Studies such as those conducted by Leung and Fung (2005) and Tanner (2009) have demonstrated that the quality of school facilities plays a crucial role in learners' academic performance, learning effectiveness and behaviour. It is thus emphasised that effective management of facilities within schools plays a vital role in achieving the main goal of education, namely quality teaching and learning (Abisuga, Famakin & Oshodi 2016). Consequently, the conditions of the classrooms in South Africa are under scrutiny in this study. Moreover, Gustafsson and Patel (2008) conducted research on the class sizes of schools in South Africa and concluded that it certainly affected learner achievement. According to Mobegi (2017), in poorly maintained schools, classrooms do not have roofs, classroom floors are full of potholes and windowpanes are broken. However, the Gauteng Department of Education has promised to rehabilitate the school and others in similar conditions. As indicated earlier, the DBE has policies with regard to the management and maintenance of all the schools in the province, but because of poor follow-up and a lack of accountability, these schools remain in these poor and appalling conditions.

■ Perimeter fencing

The perimeter fencing of a school could be seen as the 'face' of the school. The more intact it is and the better its condition, the more people will believe that it is safe for the learners and educators and that the school provides good-quality teaching and learning. However, most old schools have torn perimeter fencing, which makes the schools vulnerable to vandalism and theft because the schools become easily accessible. The importance of perimeter fencing has been widely researched, and reports have been written about its contribution to quality teaching and learning and serving as the first line of

defence (Williams & Corbin 2017). Frazelle (2020) asserts that perimeter fencing is a valuable aspect of school safety in ensuring the protection of school buildings, additional facilities, learners and members of staff.

The author's personal observation is that perimeter fencing is not given priority in most township schools. Where there are sports fields, local soccer teams tear the fences down to gain access to the sports fields. Nevertheless, it is still the responsibility of the principal and the SGB to maintain all the school facilities because all of these play a role in shaping the future of the learners.

■ Aim of the study

As alluded to earlier in the introduction and problem statement, the aim of this study is to explore the perceptions of school staff and SGBs on their continued use of ageing school facilities in Gauteng, South Africa.

■ Research methodology

This study employed a qualitative approach, as the aim was to explore the participants' perceptions of the study phenomenon. The approach was coupled with an interpretivist paradigm in order to interpret and understand the phenomenon better (cf. De Vos et al. 2016). Phenomenology as a key strategy for data collection was preferred for the study because it aims to explain a person-conscious experience of everyday life and social interaction (Schwand, Lincon & Guba 2007). As expected in phenomenology, the collected data are presented in a relatively raw form to demonstrate their authenticity. The sample for data collection was drawn from the population of school staff and SGB members from both primary and secondary schools. These schools were selected from a list of ageing schools of the Gauteng Department of Education in the Sedibeng West District.

■ Data collection

Data were collected through face-to-face, semi-structured focus group interviews. An interview schedule with eight open-ended questions was used. All ethical standards for conducting qualitative research were observed, and the trustworthiness of the study was ensured. The interview proceedings were voice recorded with the consent of the individual participants and transcribed verbatim.

■ Data analysis

The data were analysed in accordance with the prescripts of McMillan and Schumacher (2006:364) that indicate that data can be 'broken down by means of coding, categorising and interpreting data to provide explanations of a single phenomenon of interest'.

■ Findings and discussion

■ The need for an increased budget

The participants indicated the inadequate budget as the main cause of all the maintenance problems at their schools. They were making a clarion call for an increased budget for school maintenance purposes. This finding is in line with most research conducted on the maintenance of school facilities. For instance, Vincent (2018:26) has found that ‘an overarching challenge is that budget constraints districts severely, limits the minor and routine facility repairs and the major modernisation work rural school district leaders would like to do’.

■ Compromised safety of educators and learners

The safety of learners in dilapidated and unhygienic ablution facilities was a matter of major concern for most of the participants. They also complained about poor – and in some instances non-existent – perimeter fencing at the schools. Inadequate perimeter fencing creates a fertile ground for vandalism and perpetual break-ins. However, top security fences have recently been donated to some of the schools. The concerns of educators regarding their own and their learners’ safety are supported by Uline and Tschannen-Moran (2010), who argue that when the school facilities are in a state of disrepair or appear dilapidated, community participation in ensuring the safety of the school is compromised. Plank, Bradshaw and Young (2009) concur and further explain that such physical disorders are related to a climate of social disorder within schools, and these conditions may evoke fear amongst learners and erode the sense of collective efficacy of a school.

■ Demolishing of old, dilapidated structures

The participants recommended the demolishing of structures that are dilapidated beyond any form of maintenance and the erection of new structures. They understood the need for good-quality school facilities for effective teaching and learning. However, this suggestion is not supported by the literature. For instance, Ali, Kamaruzzaman and Salleh (2009:57) suggest that ‘when a building has come to the end of its service life, or failed to perform its expected functions, partial refurbishment and full refurbishment can be alternatives instead of demolition’.

■ Violation of learners’ and educators’ human dignity

The participants in the study wanted to work in an environment where their human dignity was respected and that was safe for them and their learners to operate in. Educators, like most workers in various fields, make decisions on whether to remain in their current job based on both the level of compensation

and the quality of the work environment (Ladd 2011). According to Uline et al. (2010):

[L]earners, educators, parents and community members initially come to understand the primary functions of school through their observations of the buildings and grounds. Occupants struggle to perceive a clear focus on academics when the facility is architecturally substandard or poorly maintained. Under such circumstances, the learning environment is less likely to be conceived as being worth its occupants' attention. (p. 596)

■ Community involvement

It was found that most schools opened their facilities for use by the immediate communities. This is done with the purpose of expecting the community to guard against any vandalism and break-ins at the schools. Schools are used mostly by local indigenous churches and political parties for community meetings. This finding is corroborated by the finding of Uline and Tschannen-Moran (2008:56) that when 'buildings are in disrepair or appear dilapidated, the community is less likely to engage in activities supportive of the school's mission'.

■ Lack of policy implementation by the Gauteng Department of Education

The participants were aware of numerous policies related to school facilities maintenance, including the maintenance of ageing facilities. However, it became evident that no officials had been assigned the duties of school facilities maintenance, which was carried out on an *ad hoc* basis. Mojela and Thwala (2012) add that policymakers, the government and ordinary people worldwide have acknowledged the fact that the dilapidated state of public schools' infrastructure can no longer be ignored. According to the Gauteng Department of Education (2014), the NEIMS information for Gauteng, as well as other internal assessments, has documented a significant deterioration in the condition of schools owing to poor or even no maintenance. For this reason, it is important for the Gauteng Department of Education to ensure that it continues to improve its maintenance programmes in a structured manner. This implies that the Gauteng Department of Education is expected to be hands-on and ensure that all the prescribed policies with regard to the management and maintenance of school facilities are enforced without fail.

■ Using and maintaining ageing school facilities in Gauteng

The author conducted research on the perceptions of school staff and SGBs in the Sedibeng West District in Gauteng. Two focus groups with five participants in each were interviewed. The first group consisted of school principals only, and the other group consisted of two educator members and

three parent members of the SGB. The sample total was ten participants. The schools were selected based on data from the DBE on old schools in Gauteng. All of the participants had worked in their current schools for more than five years, and the SGB members were serving a second term in their respective SGBs. Participant 1 commented:

‘I served at this school for 34 years. The institution is more than 40 years old, because I started teaching in the school in 1977 and it was already built, and then they had Grade 8 up to 11. Then we started with Grade 12 in 1978.’ (Participant 1, male principal, 34 years’ experience)

Participant 2 said:

‘I only joined the school, ehh, it will be seven years July this year. I arrived in 2012, but the school records are indicating that the school was established in 1976. Initially the school was platooning at Siyathanda Primary School, and later a – later a new building was constructed, and they moved to this site in Sebokeng.’ (Participant 2, female principal, 10 years’ experience)

These comments indicate that there are schools with old facilities in full operation in Gauteng and probably in all the provinces of South Africa.

■ School age

In response to a question about the age of schools, the participants indicated that indeed their schools were older than 40 years. Participant 3 replied:

‘As I have already indicated before, I can safely say that my school is, ehh, 41 years since the school was built.’ (Participant 3, male SGB educator, 7 years’ experience)

Participant 1 said, ‘[t]he institution is, I believe, is more than 40 years old’ (Participant 1, male principal, 34 years’ experience). Participant 4 stated that her school was one of the oldest in the municipality:

‘I attended my primary school at this school in 1971. My elder siblings attended before me. That shows you that the school is pretty old. However, I cannot tell you exactly how old the school is.’ (Participant 4, female SGB parent member, 6 years’ experience)

Participant 5 indicated that his school was more than 56 years old. He said:

‘The school is almost 56 years. It started in 1964. No, the school started in 1964 with five classes. It was a new school when it started in 1964. As years go [*sic*] by, additional classes were added. At this point in time, the school has almost 19 classes, including the career centre and the computer lab.’ (Participant 5, male principal, 10 years’ experience)

■ Knowledge with regard to policies about maintenance of old school facilities

It became evident that the educators and the SGBs had no knowledge of the policies that guided schools in terms of the maintenance of facilities.

When probed about their knowledge of policies regarding school facilities maintenance, Participant 6 responded:

‘Ehh, not exactly. But what I can say is that I know that we do have a policy that, err, relates to the maintenance of school facilities.’ (Participant 6, female SGB parent member, 6 years’ experience)

However, Participant 3 pointed out:

‘Legislation related to school facilities maintenance? Yes, I am, but we are familiar with a number of various documents, or let me say, policies and circulars of the Department.’ (Participant 3, male SGB educator, 7 years’ experience)

It could be detected that Participant 3 did not have knowledge of the legislation because, when probed, he replied:

‘We do have guidelines that are assisting us. There is a file, it is called ‘exemplar guideline’, exemplar following checklist file, and this is assisting us in order to develop school policies that are, are, are relevant to the school. We need to contextualise whatever is there; this is just a guide.’ (Participant 3, male SGB educator, 7 years’ experience)

Participant 2 had more knowledge with regard to the policies available and what needs to be done at a school in terms of the maintenance of ageing schools. She responded:

‘Not at all; there are regulations that one goes through to be conversant, but you know that in terms of the maintenance of the school, the school should be maintained so that it can be conducive for teaching and learning. To be honest, one relies on SASA, that will say, the SGB has to manage the school and property. The governance policies are also assisting that you take it from that particular angle, but there are [*sic*] legislation, as you were asking, that we get from the Department from that particular time. Then we shelf it, ehh, but you know, it is difficult to go through it, but you know the standards should not pose danger to the lives of educators and children and all staff members, in terms of cracks on the walls, in terms of broken windows that may cause some challenges, you also look at the bare wires of electric wires. Also goes beyond hygiene – where you have to make sure that toilets are well maintained, they are in a proper state. It goes to the fencing itself; it limits the entry for the [*sic*] people who come and vandalises the school, and so on and so on.’ (Participant 2, female principal, 10 years’ experience)

■ Usage of school facilities

It was evident from the participants’ responses that the school communities were allowed to make use of the school facilities. However, stringent rules were laid down for these communities when they sought permission to use the school facilities. Participant 1 responded:

‘The school facilities are, I would not say, all of these that I have mentioned are utilised by the school community. The only time when we are utilising these for the community members is for churches and other groups, that are youth [*sic*], youth

groups that are coming to request to use the, our facilities. The school hall, yes.' (Participant 1, male principal, 34 years' experience)

Participant 2 said:

'Basically, the school facilities are utilised for the purpose of teaching and education, basically. Secondly, they are also utilised for the use of the community around here. We have neighbouring communities around and the question of churches around our school [*that*] utilise the school. Besides the churches, at times, political bodies also request to use the school for their meetings. But primarily, they are used for teaching. In the past, we did not [...] experience a lot of damage except that most of them were not left clean. That was the only problem that we had. With regard to furniture, it was left in a good condition.' (Participant 2, female principal, 10 years' experience)

Participant 5, a male principal with 10 years' experience, interjected, introduced the challenge of criminality and said:

'It is not only that; we are also having problems with criminal elements around the area. People are taking advantage. In my school, we were not having [*sic*] a fence for some time, until Transnet donated to the school this clear-view fence.' (Participant 5, male principal, 10 years' experience)

Other schools had lost some of their valuable assets, and accordingly, a participant responded:

'We lost quite a number of things - stationery, benches that were donated to us - because criminals were taking advantage of our vulnerable premises.' (Unspecified participant, unspecified position, unspecified experience)

These responses show that the school communities are also part of these schools, and as such, they are expected to protect their schools from vandalism and break-ins.

Participant 2 was quite elaborate in discussing the usage of school facilities by the community and the relationship that was brokered between the school and the community. She said:

'School facilities are utilised. Yes, the school belongs to the community. That is where we are starting, to say the school belongs to the community, and it is for the community to look after the school so that the school is always in a good state. It should allow them to use the school for meetings for the organisations, all the organisations are utilising the school. The churches are utilising the school, even the clubs in the location, because we do not have sporting facilities, but in our schoolyard, we have sport grounds. They come in there and train afternoons, but they make sure that they take care of the school, and they contribute by donations to assist the school, so we have a good relationship with the school; in case where we do not have some facilities, then we are able to use the community facilities, like [*the*] community hall, and so on and so on.' (Participant 2, female principal, 10 years' experience)

It became evident that the schools depended on the community for safeguarding the facilities, and the community, in return, had the advantage of using the facilities for various activities.

■ Challenges pertaining to ageing school facilities

Regarding the challenges pertaining to old school facilities, Participant 6 shared:

'Like I said, our school is old, and we need some, what can I say? Look, for instance, most of our facilities are worn out. Toilets are blocked from time to time, low water pressure, torn fence and broken windowpanes, those are some of the things that need, ehh, need, need attention, that's all. The building is old.' (Participant 6, female SGB parent member, 6 years' experience)

Additionally, Participant 5 responded:

'We are unable to maintain our schools because we do not have financial means to do so. The budget allocated to this important function is disappointingly low. Otherwise, if it can be increased, we may be able to resuscitate the school facilities.' (Participant 5, male principal, 10 years' experience)

Participant 3 echoed the same sentiment and added:

'For instance, we do [*sic*] not afford the services of professional maintenance people because of [*a*] lack of funds, and our municipality is incapable of providing any services to schools around here.' (Participant 3, male SGB educator, 7 years' experience)

Participant 6 argued:

'The allocation is not enough. In fact, money is never enough, yeah, so with this one, there are what we call five key things that are attended to by the Department of Education – electricity, painting, plumbing, major, major one, that are the responsibility of the Department. So our challenge is that the Department of Education does not respond in time when we report these challenges to them, while in the meantime, you are utilising the little money that you have.' (Participant 6, female SGB parent member, 6 years' experience)

■ Recommendations

This study recommends the following:

- In each district office of the Gauteng Department of Education, an official should be assigned to deal with the maintenance of school facilities, especially those of ageing schools. The person to be appointed should have the requisite qualifications and expertise in developing and maintaining infrastructure.
- School governing bodies should be fully capacitated to handle issues concerning school facilities. For example, when the facilities show signs of deterioration, the SGB should be able to deal with these before more structural damage, accidents or fatalities occur.
- Alternatively, the facilities of ageing schools should be reported to and be the sole responsibility of the provincial or national government.

- A fixed amount, not more than 12%, of the government grant to the school should be allocated to all schools for maintenance purposes.
- The state should be held legally accountable for subjecting learners to substandard ablution facilities, which at times results in fatalities in rural areas.

■ Conclusion

The sense one gets from the perspectives of educators is that ageing school facilities are not accorded priority in Gauteng. The maintenance and refurbishment of ageing school facilities happen only after a serious accident has occurred. For instance, a learner must first fall into an open utility hole or pit toilet and be seriously injured or die before something is done about the situation. It is an indication that there is so much that needs to be done to address the needs and improve the conditions of public school facilities in Gauteng and South Africa at large. Numerous factors contribute to the appalling state of the ageing facilities of public schools, such as vandalism, the uneven distribution of funds and a lack of clear national consequence management for failure to implement standard policies. It does not matter whether school facilities are new or old; the most important thing to do is to maintain them so that their lifespans can be extended and they can serve their purpose.

The study was conducted during the hard lockdown in South Africa; consequently, it was not easy to approach the participants for face-to-face interviews. The study relied on virtual platforms, which was a huge challenge for participants who were not computer-literate. It should be noted that more perceptions of school staff and SGBs could have been collected so that the findings could be generalised. Nevertheless, the participants interviewed in this study provided independent perceptions about what they felt was the impact of ageing school facilities on teaching and learning, as well as in other contexts at their schools.

■ Acknowledgement

The author thanks J. Gibberd for granting permission to use his work in this study.

Continuous professional development in Namibia: Perspectives and critique

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■ Abstract

The 2030 vision of the Republic of Namibia is to train its people so that they will be educated in information technology, innovation and manufacturing. This can only be done through effective education and training. For this reason, the focus is on continuous professional development (CPD) for teachers so that they can learn the necessary skills to make this vision a reality. However, CPD must be well-managed to produce the best results. In addition, evaluation and control are of the essence. Principals and school committees,

How to cite: Kayumbu, J, Van Jaarsveld, L & Conley, L 2022, 'Continuous Professional Development in Namibia: Perspectives and Critique', in L van Jaarsveld, CC Wolhuter & CP van der Vyver (eds.), *Education Leadership: Scoping, perspectives and future trajectory*, AOSIS Books, Cape Town, pp. 119-136. <https://doi.org/10.4102/aosis.2022.BK383.07>

at the school level, are responsible for implementing CPD, then managing it and evaluating it. The aim of this study was to determine the perspectives of teachers and principals regarding the implementation and management of the continuous professional development programme (CPDP). A qualitative design and phenomenological strategy of inquiry were followed from the interpretivist paradigm. The sample comprised 17 participants, and the data were collected through interviews. By identifying themes, the research questions could be answered. The results showed that the teachers were unsure about what the CPDP entailed exactly. Furthermore, from the teachers' point of view, there were many flaws in CPD. Aspects such as non-involvement in the decision-making process, a lack of guidance and management and a lack of expertise emerged.

■ Introduction

Continuous professional development is not a new phenomenon. The goal of CPD is to 'promote accountability and facilitate the CPD of the employees of an organisation' (Mchunu & Steyn 2017:9313). This statement also applies to schools where teachers need to be constantly monitored so that standards of teaching and learning can be raised and professional expertise and pedagogic skills enhanced, as well as ensuring that teachers master their subject area and broaden their knowledge of their subject area (Asgar & Ratram 2019). In short, CPD is essential for maintaining quality education and encouraging teachers to develop their skills. Several studies have been conducted on the subject of CPD. Kawaguchi (2020) sheds light on teachers' CPD in the African context. Other studies include the implementation and management of CPD (Desta, Chalchisa & Lemma 2013; Meke 2011; Mohamed, Ghonein & James 2013), the impact of CPD in schools (Stephen 2012), the importance and usefulness of CPD (Mohamed et al. 2013) and the challenges surrounding the implementation and management of CPD (Desta et al. 2013). The research conducted by Xaso, Galloway and Adu (2017) provides both a national and an international perspective on continuing professional teacher development. In another study, Srinivasacharlu (2019) focuses on the CPD of educators in the 21st century. Adding to the body of scholarship, Asgar and Ratram investigated the CPD of teachers in India amidst the COVID-19 crisis with regard to leveraging information and communication technology tools in the online environment.

The Republic of Namibia has set a goal to train people so that by 2030 they will be educated in information technology, innovation and manufacturing (Republic of Namibia 2004). For this reason, effective education and training must be implemented. During the period before Namibia's independence, the country was characterised by an uncertain, divided education, and teacher training failed. Looking at percentages, 36% of Namibian teachers had no

vocational training. The picture changed after independence, and the focus shifted to unqualified teachers' training and professional development. This initiative was known as the CPDP and commenced in 2012. The initiative was driven by the Basic Education Teachers Diploma In-Service Education Training. However, training and professional development were cast in a form that suited everyone, and there was no room for individual development. A large gap in the literature was experienced with regard to the assessment of CPD and the evaluation thereof. Challenges were examined, along with the measures that were put in place to deal with the challenges. According to Bucynski and Hansen (2010) and Hale (2015), the success of the initiative depends on how well the initiative is supported when implementation and management occur. This statement is especially applicable to the implementation and management of CPD in Namibian schools. Feedback from teachers suggests that some schools are struggling to manage the CPDP while other schools have failed to implement the programme (Oshana Regional Council 2014).

The focus of this study, through the lens of the theory of change, is on the perceptions of principals and teachers of how effectively the implementation and management of the CPDP were implemented in one of the regions of Namibia (cf. Thomson & Sanders 2010).

■ Continuous professional development: An overview

The concept of CPD is defined by different authors. Day (1999) defines the concept thus:

Professional development consists of all natural learning experiences and those conscious and planned activities which are intended to be of direct or indirect benefit to the individual, group or school, which contribute, through these, to the quality of education in the classroom. It is the process by which, alone and with others, teachers review, renew and extend their commitment as change agents to the moral purpose of teaching; and by which they acquire and develop critically the knowledge, skills and emotional intelligence essential to good professional thinking, planning and practice with children, young people and colleagues throughout each phase of their teaching lives. (p. 4)

For Srinivasacharlu (2019), CPD is all about activities that will lead to an improvement in a person's skills, knowledge and expertise. Xaso et al. (2017) state that CPD is all about the opportunity to learn and to change attitudes and beliefs. Clearly, no matter how researchers look at CPD, the outcome is aimed at teachers developing and improving themselves. In this regard, Xaso et al. argue that CPD provides the opportunity to improve technical and scientific knowledge. It also provides the opportunity for teachers to enhance their performance. Concomitantly, CPD provides an opportunity for teachers to play new roles, increase their career prospects and even consider a career outside of education.

Apart from the fact that there are quite a few challenges regarding the implementation of CPD, core questions arise. In this regard, Xaso et al. (2017) refer to matters such as the content characteristics, which imply credibility and the scope of CPD; that is, what exactly will be presented? In addition, aspects such as process variables are mentioned. This implies the question regarding how CPD is conducted. Furthermore, aspects such as 'who', 'when' and 'where' with regard to CPD raise concerns. In addition, questions about the facilitation, organisation and methods are posed. It is clear that once CPD is considered, many factors need to be taken into account.

■ Reasons for continuous professional development

Teachers often do not understand the meaning of a development programme. Therefore, clear reasons should be given as to why a programme such as the CPDP is being implemented. Reasons given for the introduction of development programmes include the reinforcement of teachers' expertise (Oswald 2013), improving learner performance (Posner 2015), encouraging lifelong learning (Mohamed et al. 2013), improving classroom management (Kopem 2014), maintaining a positive attitude (Kopem 2014) and improving employee morale (Al-Zoubi & Younes 2015). Although reasons may be given as to why it is important that development programmes are put in place, if the strategies to manage the programme successfully are lacking, there is no point in implementing such a programme. Two management strategies are put forward which lead the CPDP to success, namely formal and informal strategies. As far as formal CPD strategies are concerned, workshops, conferences and seminars are presented as examples. These give the teachers the opportunity to look at the programme from a different angle outside their daily environment (Mohamed et al. 2013). Informal strategies, informal conversations, dialogues and discussions are presented. Training or mentoring, teachers' reflection, groups and cascade forms of CPD are debated as informal CPD strategies (Posner 2015).

■ Structure of continuous professional development programme

Although CPD is discussed at the school level in this chapter, it is important to get the full picture. Continuous professional development is structured at the national, regional and school level (University of Namibia 2012). At the school level, the role players are the principal and the school committee. Four main levels are essential to understand CPD as a programme. The teachers' needs for development are identified (Level 1) by peer observation, interviews, questionnaires, self-assessment reports, self-reflection and scholastic aptitude

test (SAT) reports. The next level is to plan (Level 2) to address these needs. Therefore, prioritising and planning templates are of the essence. Level 3 (implement) consists of enabling, directing, detailing, distributing reports, teamwork and making prospects for teacher scholarship. Level 4 (evaluate) entails supporting, monitoring and evaluating the impact. The four levels comprise a clear structure that fits into the larger structure of the CPDP. Someone must take responsibility for managing the four levels.

When looking at the role and responsibilities of managing the CPDP, it is clear that these expand and involve a great deal. However, given the role and responsibilities, there are other contributing factors that lead to the successful implementation and management of CPD. In this regard, design principles, the competence of principals, relevant content, adequate time, proper timing and effective support are important. As far as the design principles are concerned, it is important that context is taken into account, as Namibia consists of both developed and developing communities (Saheen 2012). According to Jawas (2016), it cannot be assumed that principals know how to manage programmes as they were trained as teachers. Thus, it is understandable that some principals are not competent in training and supporting teachers to attain higher levels. With regard to the relevant content, it is important that the content of CPD is contextualised to the desires of teachers and related to classroom experiences. It is common knowledge that time is a big factor in the daily activities of teachers. Therefore, the value of CPD will be increased if the programme is used in such a way that it is efficient and manageable (Posner 2015). Accompanying adequate timing is proper timing, and in this regard, Mohamed et al. (2013) postulate that the programme will take place continuously. Without effective support, no programme can be effective (Van der Westhuizen 2013). Teachers accept change only when they receive the necessary support. Often guidance is lacking during follow-up sessions in a programme. This also applies to the CPDP.

■ Management of the continuous professional development programme

In view of the above discussion, it is important to look at the management of such a development programme. There are four stages to consider in successfully managing CPD. The planning stage addresses aspects such as assessing needs, formulating objectives, determining a plan of action and formulating a policy. When looking at the organising stage, the delegation, coordination and allocation of resources are vital. The leading stage focuses on communication and motivation. The control stage establishes standards for measuring performance, recording the actual performance, measuring and evaluating the actual performance and applying corrective measures.

■ Planning

As far as planning is concerned, it is essential that the managers (i.e. school committee and principal) have a good understanding of the needs of the school and the individuals (teachers). They have to reflect on how these needs will be addressed so that the needs can be met. The most important aspect is the time when the needs regarding the CPD activities will be addressed. In short, it means that teachers' CPD needs should be analysed and objectives planned. It must then be determined how the plan will be implemented and what policies should be put in place with regard to the teachers' CPD needs (Mohamed et al. 2013).

■ Organising

To perform CPD, it is important that its organisation is done thoroughly. Many aspects need to be considered when it comes to organisation. Amongst other things, it is important that committees are set up to steer the activities related to CPD. Furthermore, the composition of the organisational bodies should be clearly defined. Delegation and the responsibilities of the activities must be clearly indicated (Mondy 2015).

■ Leading

Leading refers to who takes the lead during CPD (Gerard 2015). Here, the managers play an important role in motivating the participants (teachers), encouraging them and leading them in the right direction. Communication is therefore of utmost importance so that roles, activities and leadership are fully understood.

■ Control

The value of control can never be underestimated. Continuous professional development managers should pay more attention to performance assessment of the prescribed task along with the set goals and purpose prearranged during the preparation stage (Wang, Gurr & Drysdale 2016). To effectively perform control, the following four steps are important: measurable criteria are developed so that the performance can be measured fairly; assessment and evaluation of the tangible performance are important; the tangible performance must be compared to the set of criteria; and, lastly, corrective methods must be put in place.

Looking back at all the aspects that need to be taken into account when it comes to CPD, it is clear that challenges with regard to CPD do emerge.

■ Challenges with regard to the continuous professional development programme

As with any new initiative or programme, there are always challenges that get in the way of the managers of such an initiative or programme. Probably one of the very first challenges mentioned for a programme such as CPD is the lack of training. The assumption is reinforced by Mizell's (2010) remark that training for managers is too often overlooked, and then principals are expected to run programmes without the necessary support. Following this, programmes are presented without the necessary financial support. This means that in times of financial crisis, financial support for CPD is amongst the first items to be cut off, leaving CPD managers stranded and unable to run the programme (Mwesiga 2017). Another challenge that managers of CPD face is the lack of facilities to make CPD successful. Mohamed et al. (2013) refer in particular to the fact that CPD is deficient in rural areas where a lack of transport further impairs CPD. When looking specifically at the teacher, and CPD is really about, three aspects come to the fore, namely a lack of proper teaching materials (Kopem 2014), the low availability of teaching materials (Cooper 2017) and the shortage of subject advisors who need to provide the necessary guidance (Desta et al. 2013). The following question can be asked involuntarily: how can CPD take place if there is a lack of study material, resources, furniture and laboratory equipment? Concomitant with the lack of teaching materials is the challenge of teaching materials that are available but do not reach the schools. As far as advisors are concerned, it is a matter of their being there to give guidance, but they reach out too little to teachers, especially those in remote schools.

Other common challenges that arise are a lack of interest in CPD, especially in view of the given challenges, as well as a lack of significant rewards. In addition, the heavy workload (which includes limited time) teachers experience contributes to the fact that teachers are generally not interested in CPD.

From these earlier stated facts, it can be deduced that CPD is not a walk in the park. That is why the theory of change makes sense in this research. According to Van der Westhuizen (2013), human beings tend to resist change. Therefore, it is essential for change to be committed with consultation, and the involvement of all parties is important. The managers of CPD should support and encourage teachers to take the step of change. Also, planning is crucial so that the transition to change (implementation of the CPD) takes place smoothly. Therefore, Lewin's three-step theory of change is a guideline for the successful implementation of CPD.

Lewin's (1951) first step within the theory of change is the unfreezing of the established order or the present scenario. Unfreezing is needed to limit resistance from people (teachers) within the social establishment (school) and might be achieved by increasing the driving forces that discourage group members from maintaining the existing behaviour or the present. The second

step in Lewin's (1951) theory of change emphasises the necessity of moving the target system to a brand-new level of equilibrium. This involves the staff's persuasion to accept that the present behaviour or established order is not useful to them (hence, CPD is necessary). The third step needs to occur once the meant amendment (CPD) has been enforced. During this step, the newly established order needs to be maintained, sustained and engineered to be strong because it has to survive over time.

■ Research design and methodology

This study is grounded in the interpretive paradigm. According to Morehouse (2011), the interpretive paradigm allows researchers to understand their experiences through the eyes of the participants. The idea is that individual participants within a given context are better understood. In this way, an overall picture of the different opinions of participants can be obtained. Through the interpretive paradigm, the experiences of the school committee and teachers can be explored. By following the qualitative research design, the participants' daily lives are understood, and a better understanding is attained regarding why they are that way and how the participants perceive them. According to Yanow and Schwartz-Shea (2011), researchers find the answer to 'how' questions; in other words, how do the participants experience CPD? In addition to the interpretive paradigm and qualitative research design, a case study was used. Leedy and Ormrod (2012) point out that a case study is ideal for learning more about a little-known area or a poorly understood situation. The reasons why CPD is deficient are therefore relevant here.

■ Population, sample and research site

The population in this study comprised 137 schools in the Oshana Education Region. An accurate sample result with correct data can be used to represent the population in a study (McMillan & Schumacher 2012). For this reason, a purposive sampling method was followed, and four schools were selected. The participants were the school principals, two teachers serving on the school committee at each school, one teacher not serving on the school committee who had been teaching at the school from the time the CPDP had been implemented, as well as the coordinator of the Regional Committee. The codes of the participants are displayed in Table 7.1.

TABLE 7.1: Participants' codes.

School	Principals	Teachers
A	PrA	T1A, T2A, T3A
B	PrB	T1B, T2B, T3B
C	PrC	T1C, T2C, T3C
D	PrD	T1D, T2D, T3D

Key: Pr, principal; T, teacher.

Note: The Regional Committee coordinator is coded as 'RC'.

■ Data collection and data analysis

The best way to obtain information from the participants in this study was through semi-structured interviews. In this regard, Visscher (2013) is of the opinion that semi-structured interviews contribute to purposeful interaction between the researcher and the participants. Four schools and 17 participants were used to ensure sufficient data collection. The interviews lasted about an hour and took place at a venue suitable for the participants. During the data analysis process, the steps suggested by Creswell (2014) were followed. These steps included the transcription, organisation, coding and categorisation of the data. Thereafter, themes were identified. To ensure the trustworthiness of the study, credibility, confirmability, dependability and transferability were taken into consideration. Lastly, research ethics were followed. The necessary ethical protocols were adhered to (informed consent, privacy, anonymity and confidentiality), and the necessary permission was obtained from the Ethics Committee of NWU and from the Oshana Education Region Director (Namibia).

■ Findings²

The objectives of the study were to investigate the role played by the school committee in ensuring the effective management of the CPDP in schools in the Oshana Education Region, to examine the challenges experienced by schools and school committees in the Oshana Education Region in the management of the CPDP, to explore the measures put in place to address these challenges and to explore what could be done to support the effective management of the CPDP in schools in the Oshana Education Region. From this study, four themes emerged, which are discussed in this section of the chapter.

■ Theme 1: Perceptions of the participants on the continuous professional development programme in Namibia

Before the participants were asked if they were aware of the CPDP, the researcher had to determine whether they had knowledge of CPD. It emerged that CPD had been applied for some time but that it was not structured. Workshops were offered, and seminars were attended. Speakers, often appointed by the department, addressed and motivated the teachers. From the conversations, it emerged that the teachers were on the one side, and on the other side, removed from them, was CPD. There was a need for a structured plan or programme to help in the development of teachers in their immediate environment and for them to receive guidance from people who truly know the essence of education.

2. This section of the chapter represents a substantial reworking (more than 50%) of Kayumba (2020).

To get a better picture of the CPDP, the researcher first had to determine what had preceded the CPDP. The majority of the participants indicated that there had been previous programmes that had focused on CPD. However, these targeted only specific groups of teachers. One participant said:

‘Previously, we provided induction to new teachers but mostly focused only on the newly recruited teachers.’ (PrD, principal, interviewed 21 May 2018)

The participants were then asked what they understood by CPD. It was clear that most of the participants had a good understanding of CPD and that they were familiar with it. PrC mentioned that the CPDP had several purposes and that the main goal was to develop teachers professionally so that they were in control of their workplace. In addition, both new and experienced teachers were included. According to the teachers who served on the school committee, the CPDP is an excellent programme where teachers can point out what their needs are. T3C added that the CPDP offered teachers the opportunity to be innovative because what they had learnt in college was becoming obsolete. Through CPD, they are exposed to new developments that are taking place in the field of education. On the other hand, it was surprising to hear that some of the participants had no or only a vague idea of what CPD entailed. Some remarked that it was the first time they had heard of CPD as a programme. One participant replied:

‘I was not aware of the old staff development programmes, and I came to know this CPDP not many days ago. I heard about it when I was told that I will be part of the interview; then I read books and files, but I understand it is a good initiative by whoever came up with this.’ (T1A, teacher, interviewed 3 May 2018)

Yet another remark made it clear that one of the participants had no idea about previous CPD initiatives:

‘I’m not really aware of the previous staff development programmes. I am not aware of the previous activities carried out here.’ (T1C, teacher, interviewed 15 May 2018)

It was clear that some of the participants had only a vague idea of what the CPDP was. Thus, it was clear that it had certainly not been implemented in their schools. However, some participants indicated that there used to be some form of a development programme, although they were not sure whether there was a new programme. What did emerge was the fact that all the principals and the Regional Committee coordinator were well aware of the CPDP (as a new programme for CPD) that had been established for teachers. In this regard, the Regional Committee coordinator explained his thoughts about the CPDP:

‘In my understanding, “CPDP” is fairly a new term, but professional development activities have been going on for a long time. I think CPDP is more coordinated and is continuing, as the name indicates, unlike the previous ones that were sort of disconnected, just a “one-shot thing,” and then teachers will go on as usual. CPDP is continuing until the teacher feels he or she is positive and pretty sure that he or she gained the experience and the information needed in a professional development aspect.’ (RC, Regional Committee coordinator, interviewed 25 May 2018)

It also emerged that the principals felt that the CPDP was more structured in terms of the needs of the teachers and how they were addressed. In this regard, the teachers experienced the CPDP as a good programme because they were identifying their teaching problems and professional needs at their schools, formulating possible solutions thereto and making suggestions about what ought to be done to curb their teaching problems. It was clear that the core of the programme focused on professional development, was being addressed. Yet there was a gap in terms of what the programme entailed and the knowledge the teachers had about the programme. In one case, a teacher had to look up more information about the CPDP on the Internet and read documents about it. On the one hand, there were informed teachers who understood that CPD was established through a programme (CPDP) to develop them, and on the other hand, some teachers had only a vague idea of what CPD meant and that it could only happen if there was a structured programme. Only when the two 'poles' of perceptions meet each other can CPD come into its own. Taking into account this argument, it is clear that there is a lack of communication on CPD.

■ Theme 2: The purpose and success of continuous professional development as a programme

With reference to the purpose of the CPDP, the participants highlighted three objectives, namely strengthening the expertise of teachers, improving teacher and learner performance and promoting lifelong learning. Regarding the strengthening of teachers, most of the participants mentioned teaching approaches and methods. It was clear that they felt that approaches and methods could bring about change that could increase the quality of teaching and learning. PrD reacted thus:

'Teachers are required to be transformed through continuous training so that the level of knowledge and skills could be developed so that the learners' performance could improve.' (PrD, principal, interviewed 21 May 2018)

What was important, however, was the fact that not only did there have to be a change in the classroom, but also the teachers had to keep up with the change in education. For this reason, one of the goals of the CPDP was to develop the skills and knowledge of the teachers. This can be done by making unqualified teachers attain the required qualifications. Significant was the fact that the teachers believed that the CPDP could give them the opportunity to improve their qualifications. New approaches, methods and qualifications contribute to improving the performance of teachers and learners. In this regard, PrD responded:

'Before independence, many teachers in Namibia were not given proper teacher training, and this resulted in teachers' inability to execute the teaching duties per the Ministry of Education's expectation and [*being*] unable to manage the classrooms

effectively; thus a continuous professional development in their teaching career is inevitable.' (PrD, principal, interviewed 21 May 2018)

This remark is in line with the remarks of the principals, who stated that some teachers taught subjects in which they had not been trained. Not only do they not have the basic knowledge and content of the subject, but they are unsure of how to present the subject, which leads to a lack of confidence. In addition, T2D noted:

'There is a need for CPDP to keep serving teachers in line with the latest developments and trends regarding their daily tasks; so in this way, teachers are capable of overcoming the latest changes attached to their daily classroom tasks.' (T2D, teacher: interviewed)

Keeping abreast of new developments in education requires lifelong learning. This can only happen when a purposeful plan is put in place. In-service training is at stake here:

'As new changes are continuously introduced in the education system, all teachers require continuous learning through their teaching careers; thus [*the*] CPDP was initiated to diversify their learning processes.' (PrD, principal, interviewed 21 May 2018)

As mentioned before, the teachers at some schools had only a vague idea of CPDP, while the teachers at other schools were more aware of the programme. When the implementation of the programme was touched upon, again there were divergent reactions. Most of the participants, including the Regional Committee coordinator, indicated that the implementation of the programme was very poor. In this regard, the Regional Committee coordinator explained:

'I admit CPDP in this new form as a coordinated coherent and systematic programme is not really off [*the*] ground in the Oshana Region. All schools were informed to identify their needs and forward them to the region; however, only a few schools have done so and, unfortunately, from our side as a Regional Committee, we also failed to follow up on those schools which did not respond. Only a few schools responded to this request. We developed the Regional Action Plan, but unfortunately, due to some other activities, we did not do much on that action planned because most of our colleagues who are spearheading the professional development activities, that is, the senior education officers in the Advisory Services, were preoccupied with training on the revised curriculum. The funds meant for CPDP activities were diverted to the training of revised curriculum for the Junior Primary Phase and then the Senior Primary Phase; hence not much has been done on the action planned.' (RC, Regional Committee coordinator, interviewed 25 May 2018)

This recognition was from the coordinator's side, but it also spread to the schools, and the principals agreed that the programme had been implemented unsuccessfully. According to one of the principals, the blame for the unsuccessful implementation should rest on the shoulders of the coordinator:

'All our expectations were not met because we did not really get help from Oshana Regional Office. We sent the list of our needs to the Regional Office where we indicated areas where we need help, but there is no feedback. Now we are only doing our things ourselves; that is why this CPDP is not fairly functioning at our school.' (PrA, principal, interviewed 3 May 2018)

The teachers added fuel to the fire, noting that the implementation of the CPDP had completely failed. They, in turn, placed the blame on the shoulders of the school committee. The school committee representatives again mentioned that meetings had been arranged but that the needs of the teachers had not been addressed. Also, there were no follow-up meetings. Clearly, no one wanted to take the blame, and the responsibility was always placed on someone else's shoulders. Here again, the lack of communication is clear. The participants were able to see the purpose of the CPDP but indicated that the programme had not been successfully implemented.

The reasons why the programme was unsuccessfully implemented are discussed under the third theme.

■ **Theme 3: Challenges experienced by the school committee when managing the continuous professional development programme**

In this theme, eight reasons emerged as to why the CPDP had been unsuccessfully implemented. One of the first challenges that emerged was that of a lack of expertise. This immediately raised the question of whether the programme might have been implemented in a hurry and therefore might not have been properly prepared. Apart from the fact that there were too few experts for the successful implementation of the programme, the costs associated with hiring experts were not taken into account. So planning was not done properly. The next challenge was the lack of time. Aspects such as heavy teaching loads came to the fore. In addition to the lack of time, an increased workload was mentioned. The participants argued that principals and teachers had heavy workloads, which made it difficult for them to spare time for CPDP activities. In fact, they stressed that heavy workloads made it impossible for them to carry out CPDP activities. Probably one of the main challenges was the lack of financial support. In connection to this, it was mentioned that Namibia was going through an economic recession, which had forced the government and the Ministry of Education to cut funds meant for the CPDP. It also caused teachers to be discouraged from further study.

All the mentioned challenges played a role in the participants' lack of motivation and enthusiasm. The principals were not motivated, which led to the teachers not being motivated and their enthusiasm for professional development and lifelong learning waning. Some of the participants who served as mentors for other teachers indicated that they had lost interest in participating in CPD, as their efforts were not being recognised either verbally or materially. Regarding the restriction on aids, issues such as transport, suitable accommodation and activities were mentioned.

Expertise and training go hand in hand. The participants made it clear that teachers – as part of the school committee – and principals had not received sufficient training to implement and manage the CPDP. To successfully manage such a programme, all principals must be properly trained and not just some. It is not certain whether all the principals had received the opportunity to be trained and whether it was the principals' choice not to go for training for some reason. In connection with this, the content of the training was of such a nature that it did not fall into the field of knowledge of the principals:

'When the committee was established, schools were asked to send only two members to represent the school at the training workshop, but we can see that not all mastered the training content. So it is hard to do something which you did [*sic*] not understand well.' (T3B, teacher, interviewed 8 May 2018)

When asked what would have helped to implement and manage the programme successfully, the participants mentioned that providing appropriate and sufficient resources would lead to the successful management of the CPDP.

■ Theme 4: Strategies leading to effective management of the continuous professional development programme

In the previous section, the principals' and teachers' perception of the CPDP has been given, as well as some challenges that were experienced with regard to the implementation and management of the CPDP. In this section, strategies regarding how the CPDP can be managed effectively are discussed. The strategies build on the challenges the participants experienced.

Striking was the fact that the participants mentioned sustainable training first as a strategy to make the CPDP succeed. In this regard, two main aspects came to the fore, namely continuous training and the mode of training. For the participants, continuous training was important. For them, it does not make sense to be trained once in the CPDP. In their eyes, continuous training is equal to CPD. Continuity and lifelong learning also go hand in hand. Formal and informal modes of training should be alternated, but these should be clearly stipulated and considered according to the finances of the school and the time of the participants. Workshops, in-service training and study courses can be alternated with mentoring, the observation of other teachers for learning purposes and peer coaching. By doing this, participants will be more motivated. In line with the issue of motivation through the training and mode of presentation, the participants felt that motivation should also come from the managers. Some of the participants expressed themselves:

'Although principals cannot provide us with financial benefits, at least giving feedback goes a long way. At least we'll know that we are doing something.' (T2C, teacher, interviewed 15 May 2018)

'Sometimes we get feedback, while many a time it takes long for the principal to give us feedback.' (T3A, teacher, interviewed 3 May 2018)

As for the workload, the participants felt that the ratio should be adjusted, because in some cases the ratio was 1:50. To make matters worse, positions are not filled, and then current teachers have to offer extra subjects.

Planning is presented as the most important aspect of any management activity. The participants had much to say about the activities and the planning of the activities. According to them, they should have insight into the planning of the activities as each school has a unique dynamic. Such activities can therefore not be planned at the national level. After that, it must be considered where the activities will fit into the annual planning and not simply be added to the year planning for the sake of the CPDP. Furthermore, the activities must be planned in such a way that they can be attended. It is absurd to plan activities that are outside the region of the school. Only when the activities are thoroughly planned can good communication, assessment, monitoring and evaluation be properly managed.

The management tasks (planning, guidance, organisation and control) controls are often overlooked. The participants use control as a strategy to make the CPDP successful. It is essential that the CPDP managers should ensure that all required activities are efficiently controlled in order to maintain effective management of the CPDP. The participants suggested the following control methods to consider: setting criteria for determining performance; measuring performance; assessing whether the criteria have been met; assessing whether the activities have been carried out as planned; assessing the challenges; and identifying ways to mitigate the challenges, instead of leaving teachers struggling as a result of poor control. The participants emphasised that the implementation of these factors could lead to effective management of the CPDP.

■ Discussion

When looking at the CPDP holistically, it can be divided into three aspects: the purpose of the programme, the benefit of such a programme for the participants and the management of the programme. One of the most important factors to consider when implementing a programme is whether the participants are ready to make a change. It is well-known that people tend to resist change (Van der Westhuizen 2010). Therefore, it is important that prospective change is explained. Thomson and Sanders (2010) point out that the theory of change requires changes to be planned carefully to allow for the smooth and effective implementation thereof, as well as for the guidelines to be planned and the activities to be carried out.

■ Purpose of the programme

Focusing on the meaning of CPD, it sums up the purpose of a CPDP. Continuous professional development involves activities in which teachers participate during their careers to improve their work and enhance learners' learning outcomes. These activities must take place within the education policy. Subitha (2018) argues that policies should be written in such a way that lifelong learning, within the school's socio-cultural context, is accommodated. This is in line with the Namibian participants who pointed out that each school was unique. Furthermore, CPDD is therefore aimed at increasing the prestige of the teaching profession (Ucan 2016). For this reason, educational authorities must provide programmes intended for the professional growth of teachers that are *realistic* to enhance their knowledge and skills.

When the purpose of a programme is not clear, the motivation to participate in it is absent. The following question arises: was the purpose of the CPDP in Namibia merely for the sake of change in education as a whole, or was it designed in such a way that it would truly benefit the teacher? This question is in line with Fullan's (2016:97) argument that 'educational change depends on what teachers do and think'. If the focus had fallen on the fact that teachers are constantly pursuing new teaching methods and learning materials, the answer to the question would be that the CPDP stands for the development of teachers. But if it was to be of benefit to the teacher, the implementation and management thereof had to be carefully considered, and a real effort had to be made to present the CPDP successfully. This was, however, not the case in most of the Namibian schools.

From the beginning, it was clear that the participants, especially the teachers, were not quite sure what the purpose of the CPDP was. From this, it can be deduced that they had not been properly informed. It is therefore important that each role player knows exactly what is expected of him or her. The role of principals is of great importance, as they are the leaders in the school. Therefore, principals should be thoroughly trained to be able to manage any programme successfully. Thereafter, information regarding the purpose of the programme should be well communicated so that the teachers will know exactly how, what and when CPD works and will be executed. Only when the goal has been established and explained can the participants see the benefit of a programme, in this case, the CPDP.

■ Management of the programme

The structure of the CPDP is an initiative that came from the Namibian Department of Education. The person responsible for passing on the programme to the schools was the Region Committee coordinator. The principals were on the next level of responsibility, with the teachers being on

the last level. This is a clear line structure that was supposed to be followed. Although the line structure was in place, communication channels were not clear. This statement is supported by the teachers' remarks that they had heard of the CPDP but did not really know what it entailed. On the other hand, where the CPDP had been successfully implemented, some of the members appreciated their roles of responsibility. When the right person is appointed in the right position, communication is usually clear. These persons are also aware of the planning, coordination, organisation and control. It all starts with planning. Lourens (2012) and Wang et al. (2016) argue that thorough planning of teachers' needs should be established in such a programme. The people responsible for the implementation and management of the programme must take into account all the relevant aspects, such as funding, resources, needs and trainers, during the planning phase. When this does not happen, the whole programme will fail.

The school committee and the principal should pay specific attention to the management and effective planning of resources, as this is one of the most important roles they should play. Inefficient resource management can easily become the focus of a programme. On the one hand, teachers accuse the school committee and principal of ineffective management, and on the other, the school committee and the principal have no control over the resources. Again, the line structure is in question here. When clear guidelines are given from above, each role player will understand their responsibilities.

Organisation is related to a unit of purpose. Therefore the way in which the programme is organised will contribute to the collaboration between role players (Mondy 2015). Decision-making plays an important role, especially when the programme is being implemented. Everyone should be involved during the decision-making process. If all schools have to start the programme at the same time, it should be organised and communicated that way. In terms of leading, motivation plays an important role. Leaders have followers, and one of the characteristics of a good leader is to motivate their followers in such a way that a common goal is achieved.

Lourens (2012) asserts that successful leading requires knowledge and skills. Therefore, CPD managers must persuade, motivate, encourage and direct the staff to contribute willingly to the accomplishment of the aims and objectives laid down during the planning stage. Again, the line structure (or top-down management) plays a role. Principals claim that they cannot motivate teachers if they cannot offer compensation packages from the government. On the other hand, teachers blame the principals for not motivating them. Any programme can be implemented and executed, but if control over the content of the programme is lacking, there is no use for such a programme. Wang et al. (2016) declare that assessment and evaluation (control) must be done along with the setting of aims and objectives planned for the programme. However, the control phase is often overlooked, possibly

because of a lack of time or simply because the participants do not really find it necessary, especially when an activity has already been completed.

When the four management tasks are taken into account, it is clear that all four are equally important to make any programme management succeed. Once the four management tasks are in place, the challenges will be easier to handle and manage. Any basic challenge, such as a lack of time, funds or resources, can be managed, but when a lack of expertise is experienced all the time, money and resources cannot make a programme successful. When a new initiative emerges, the question must always be asked whether there are experts who can carry out the management of the initiative. This also applies to the CPDP. For a programme to succeed, it is important that all participants are involved and informed. Managers should enrol in long-distance managerial programmes at reputable institutions, and institutions should include managerial modules when training teachers.

■ Conclusion

Initiatives from education departments are usually well-intentioned, but often the type of programme is not laid out and defined well. As a result, role players are sometimes in the dark about what exactly is expected from them. Communication is always the core of any success story, so good communication from top to bottom should be applied throughout. All the aspects surrounding the implementation of a programme must be considered. These include context, socio-economic circumstances and other contextual determinants. The CPDP was a good idea on the part of the Namibian Department of Education precisely because it aimed to provide better-educated people and encourage lifelong learning. By keeping the four management tasks in mind, any programme can be successfully put together, implemented and managed.

Part 4

Mid-level leadership

Role conflict and role ambiguity in mid-level management in primary schools: Challenges and expectations

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■ Abstract

Being placed between the top management and the teachers in their department, HoDs face numerous challenges related to conflicting positions within their role. They experience a variety of expectations placed on them by several stakeholders. In this research, the job demands-resources (JD-R) theory formed part of the theoretical framework that was used in explaining the phenomenon of role conflict and role ambiguity. The research sought to identify the challenges that mid-level managers in primary schools face, as

How to cite: Myburgh, S & Van der Vyver, CP 2022, 'Role conflict and role ambiguity in mid-level management in primary schools: Challenges and expectations', in L van Jaarsveld, CC Wolhuter & CP van der Vyver (eds.), *Education Leadership: Scoping, perspectives and future trajectory*, AOSIS Books, Cape Town, pp. 139-159. <https://doi.org/10.4102/aosis.2022.BK383.08>

well as the expectations placed upon them by senior management and educators. A qualitative research design was used, including a purposive sample of HoDs and semi-structured individual interviews. The research found that a great deal of role conflict and role ambiguity experienced by HoDs is embedded in the core duties stipulated within the *Personnel Administrative Measures* (PAM) document, which overlap in some instances with the core duties of deputy principals, principals and master or senior teachers alike. Heads of departments further face several challenges in the execution of their daily tasks. It was also found that HoDs have to deal with high expectations from principals, specifically with regard to maintaining high standards and working towards creating a school of excellence. Teachers also expect a great deal from HoDs in the sense of having extensive knowledge and having answers readily available for everything.

■ Introduction

Mid-level management has its own prominent place in the successful functioning of an organisation. Managing in the middle, however, has its own set of challenges and unique stressors, adding to the frustrations that many mid-level managers experience. Tinline and Cooper (2016:1) describe the mid-level manager's position as being in a work pressure sandwich, with frequent demands from those stationed both above and below. Mid-level managers receive a continuous stream of feedback in the form of comments, criticism, instructions, complaints, requests, disruptions and problems from the top-level management, their direct subordinates and customers (Johnston 2014:10). Mid-level managers struggle to place and use their position of power. Anicich and Hirsh (2017b:3) have found that mid-level managers, in interacting with superiors, naturally adopt a low-power behavioural style and assume the role of a subordinate, whereas they adopt a more assertive, high-power behavioural style in their interactions with subordinates. These conflicting roles lead to increased feelings of stress and anxiety. It has also been found that individuals who often alternate between interacting with authorities in more senior positions and workforce employees of lower ranks have unique psychological experiences that are difficult to explain within existing conceptualisations of power, and this vertical code-switching will probably lead to role conflict (Anicich & Hirsh 2017a:660). In addition, Sinha and Subramanian (2012:75) report that role ambiguity ranks high as a job stressor, especially amongst mid-level managers. Bossmann, Ditzen and Schweitzer (2016:5) also report that mid-level managers struggle to define their roles and, subsequently, are unsure about what to prioritise at any given time.

Heads of Department (HoDs) are the mid-level managers in schools. This chapter reports on a study that has investigated the role conflict and role ambiguity they experience in their position and explores the challenges they face and the expectations placed upon them.

■ Background and problem statement

In general, and in the corporate world, it has been found that mid-level managers experience major role conflict. Anicich and Hirsh (2017b:3) explain that mid-level managers find themselves sandwiched between endless conflicting demands because of the nature of their position of being stuck in the middle of different stakeholder groups. Significant factors contributing to this conflict include the feeling of having to do things against one's better judgement and wanting to handle things differently but not having the freedom to do so (Sinha & Subramanian 2012:75). Adding to this, mid-level managers have also been found to experience the highest levels of role ambiguity in comparison to low-level managers and high-level managers, with vague job descriptions and being unsure of their tasks and responsibilities mentioned as contributing factors thereto (Sinha & Subramanian 2012:75).

The question arises whether the abovementioned role conflict and role ambiguity also draw through to mid-level managers within the field of education. The PAM (DBE 2016:92) document stipulates that educators fill a Level 1 position, HoDs a Level 2 position, deputy principals a Level 3 position and principals a Level 4 position. This would place HoDs in the middle, with principals and deputy principals above them and educators, including subject heads and grade heads, below them, thus making them the mid-level managers in a school. Apart from interaction with top management and Level 1 educators, HoDs also interact with the 'customers' in the education field, which include the learners, their parents and society at large (Tohidi & Jabbari 2011:433–434).

In the *Policy Handbook for Educators*, as commissioned by the Education Labour Relations Council (2003:C-66) and the PAM document (DBE 2016, Annex. A.5), some guidelines are given regarding the job description of HoDs regarding teaching, extra-curricular activities, personnel management, administrative tasks and communicative duties. Added to this, however, the handbook also states that the responsibilities of the job are individual and varied, depending on the needs of a particular school.

Even though there is an abundance of literature on role conflict and role ambiguity amongst mid-level managers within the corporate world, research seems scant and outdated on the same within the context of education. In their study, Wise and Bush (1999:190–193) found a discrepancy between what mid-level managers believe their tasks and responsibilities are versus what their superiors believe. In another study, Collier et al. (2002:24) report HoDs feeling pressure in having to meet the needs of both the education department and top management, which oftentimes differ. Both of these studies, though, were conducted at secondary schools. Similar research could not be found for primary schools.

Because of this lack of research in the primary school setting and the need for more recent research, this study explored and aimed to determine the challenges faced by and expectations placed upon HoDs in primary schools leading to their experiencing role conflict and role ambiguity.

■ Conceptual-theoretical framework

■ Theoretical framework

The job demands-resources (JD-R) theory is used in explaining the phenomenon of challenges in the form of role conflict and role ambiguity that HoDs, as mid-level managers, are facing. The JD-R theory focuses on the well-being of employees within an organisation to ultimately improve the functioning of organisations. The JD-R model was introduced in 2001 and has since been developed into the JD-R theory. Bakker and Demerouti (2017:274), the originators of the theory, explain that all job characteristics can be classified into two broad categories of working conditions, namely job demands and job resources.

Demerouti et al. (cited by Bakker & Demerouti 2017:274) clarify job demands as those physical, psychological, social or organisational aspects of the job that require sustained physical or psychological effort. Job demands come in a variety of forms and are often job-specific. Role conflict and role ambiguity have been identified as job demands influencing employee engagement, in general, in the workplace (Breevaart & Bakker 2018:339). The effects of job demands on employees put great stress on the overall functioning of organisations. It leads to demotivation, energy depletion, and possibly even health deterioration and absenteeism amongst employees (Breevaart & Bakker 2018:339).

On the other hand, job resources refer to the physical, psychological, social or organisational aspects of the job that assist in achieving work goals and stimulate personal growth, learning and development (Bakker & Demerouti 2007:312). The presence of job resources also leads to motivation, which encourages work engagement and commitment and leads to a satisfied employee, which, in turn, has a positive effect on job performance (Bakker & Demerouti 2017:275). Job resources have been found to be varied and job-specific. Jackson (2018:743) has found that opportunities to advance within an organisation and organisational support positively affect the attitude of employees within a variety of national government departments in South Africa. Job resources stand in direct correlation to job demands, where a demand can be experienced in the absence of a specific resource (Tuckey et al. 2017:374). McIntyre, McIntyre and Francis (2017:238) concur that job resources and job demands interact, with high levels of resources being able to lessen the effect of high levels of demand.

Role conflict, role overload and role ambiguity have already been identified as job demands (Bakker & Demerouti 2017:277), while trust in top management and role clarity are named as job resources for mid-level managers (Van Wingerden, Bakker & Derks 2017:165). Furthermore, Van Wingerden et al. (2017:165) state that role clarity, as a job resource, stands in opposition to role ambiguity, which is a job demand, and can combat the negative effect thereof. Heads of department need to be wholeheartedly engaged in the roles they play and the tasks they fulfil. Job demands, such as role conflict and role ambiguity, influence work engagement negatively, whereas positive events within the workplace are transformed into job resources, helping employees or, in this case, HoDs to remain engaged (Kraimer et al. 2019:149).

■ Conceptual framework

□ Mid-level management

Companies consist of three organisational levels: top management, mid-level management and the workforce (Miller 2012:ch. 1, para. 7). Mid-level managers have progressed beyond first-line management, and while they are not at the top level, they may very well report to someone who is (Tinline & Cooper 2016:1). In addition, mid-level managers are placed in the middle of a triangle that consists of the business (or top management), the employees and the customers (Johnston 2014:9). With their specialised, professional knowledge, mid-level managers manage a specific division or subdivision within their organisation (Department of Labour 2014:2) and oversee the integration of the different divisions (Teerikangas & Birollo 2018:66). Within the educational context, the PAM document explains that HoDs are placed between post- Level 1 educators and the top management, consisting of principals and deputy principals (DBE 2016:92). Also classified as managers (DBE 2016:50), HoDs are the mid-level managers within schools. According to the DBE (2016:36–38), the core duties and responsibilities of HoDs are to be determined by each school and its specific needs. It is, however, stipulated that HoDs should engage in class teaching, ensure the optimal functioning of their departments, perform general administrative tasks, take part in extra-curricular activities and ensure that the educational well-being of the learners is being taken care of. They should, furthermore, stay in touch with the various stakeholders, provide guidance to staff members, ensure the successful implementation of the curriculum, control the work of learners and educators and compile reports for the principal. It is also expected of HoDs to be specialists in the academic field related to their departments and to involve themselves actively in the continuous evaluation and development of the staff members that form part of their departments (Du Plessis & Eberlein 2018:27).

Even though the DBE assigns the task of mentorship to master teachers (DBE 2016:35), it has been found that HoDs are key role players in mentorship (Dinham 2007:77). Heads of department are recognised and valued as leaders in schools, and consequently, leadership training for HoDs has been identified as a necessity in support of good teacher development (Mampane 2017a:149). An appointed HoD at a school fulfills a managerial position (DBE 2016:54), but Bessant and Mavin (2016:928) explain this role of HoDs is contradictory in the sense that HoDs are burdened with managerial responsibilities, and yet they lack authority, and are unsure of the extent to which they can manage the employees in their department. To add to this, Gjerde and Alvesson (2020:144) also report that even though HoDs, as managers, hold teachers in their department accountable, they are also prone to taking on the role of their protector, offering care, advice and protection, sometimes even from top management.

□ Role conflict

In the field of sociology, the term 'role' is used to describe a set of expected behaviours and obligations placed upon individuals based on their position in life and that relative to others (Crossman 2017). Role conflict occurs when there are contradictions between the different roles that a person plays in their everyday life, such as when people disagree about what the expectations are for a particular role or when someone has trouble fulfilling the expectations of a role because their duties are difficult, unclear or unpleasant (Crossman 2017). Anicich and Hirsh (2017b:3) explain that role conflict happens when a person must play very different roles. In the case of mid-level managers, this happens because they find themselves in the position of being both a leader and a subordinate. In addition, role conflict is explained as a feeling of being pulled in multiple directions and having an inability to satisfy all role partners, which would be employees and top management in the case of mid-level managers (Kras, Portillo & Taxman 2017:224; Onyemah 2008:300).

In the educational context, HoDs as mid-level managers find themselves struggling with the job demand of trying to meet the needs of the teachers within their department while also implementing the visions of the top management, especially when the two are in conflict with each other (Hinson-Hasty 2019:131). Fitzgerald (2009:63) has also found that HoDs experience role conflict in having to be accountable not only to the principal for the way in which they manage their department but also to the teachers for the way they advocate for their needs. This kind of role conflict as a job demand has been found to increase the anxiety and stress that HoDs experience in the workplace (Han, Wang & Dong 2014:483). Coupled with this, Valadez-Torres et al. (2017:562) state that heavy workloads, together with stress, result in emotional exhaustion amongst mid-level managers in the field of education.

Nixon et al. (2011:8) explain that role conflict occurs when employees receive conflicting or inconsistent information regarding their jobs from different stakeholders. Sinha and Subramanian (2012:75) add that role conflict is experienced when employees do not have the freedom to deal with specific situations in particular ways. In line with this, the success of mid-level managers in an organisation greatly relies on the power they are given and the freedom they have to make decisions, while the lack thereof can result in ineffectiveness and frustration (Ouakouak, Ouedraogo & Mbengue 2014:313). Kras et al. (2017:215) highlight another aspect causing role conflict in finding that employees place mid-level managers alongside top managers in their position, whereas mid-level managers themselves view themselves as powerless in-betweens. Even though HoDs are the accepted go-to persons for teachers in a department, HoDs feel disempowered to take control of a situation, because of their lack of authority, despite being part of the management team (Martinez-García et al. 2019:475).

Heads of department may experience role conflict stemming from a constant uncertainty about whether the top management will agree with the decisions they make when working with teachers in their departments (Anicich & Hirsh 2017a:665). Heads of department feel that even though they put forward good ideas, these are seldom recognised, nor do they bear fruit, and they are caught up in the day-to-day running of their departments (Feeney 2009:215). In addition, HoDs often lack the time to manage their departments and lead or guide their subordinates because of the time spent teaching in the classroom themselves (Bipath & Nkabinde 2018:7; Du Plessis 2015:107). This idea is echoed by Du Plessis and Eberlein (2018:13) in their finding that the extensive workload of HoDs with regard to teaching and extramural activities leaves very little time for professional development in their management role.

Branson, Franken and Penney (2016:143) revealed that for HoDs, being in the middle and combating role conflict, their feeling of contentment is embedded in the trust top management has in them. In the same sense, HoDs who feel that the teachers in their department trust them and appreciate their efforts without meeting them with suspicion and disloyalty also fare better in their role of managing those teachers (Gjerde & Alvesson 2020:147).

□ Role ambiguity

Örtqvist and Wincent (2006:399) define 'role ambiguity' as uncertainty regarding what actions to take to fulfil the expectations of a role played. Onyemah (2008:300) adds to this by explaining that role ambiguity is the perception that one lacks the information necessary to perform a job or task, which leads to a feeling of helplessness.

Corbett (2017:215) is very clear regarding the fact that mid-level managers lack guidance and have no indication of what is expected of

them in their role other than translating the bigger vision into an operational reality. Mid-level managers are often left in the dark and not consulted about changes within an organisation, with top management already enthusiastically driving these changes and employees applying the new tools and methods (Holmemo & Ingvaldsen 2016:1342). In addition, mid-level managers are often unsure of what is important and what to prioritise in their jobs and how to understand their roles (Bossmann et al. 2016:5).

According to Block (2014:333), job uncertainty and ambiguity, more than anything else, cause discomfort and unease for HoDs. De Nobile (2018:410) adds that it seems impossible to pin a 'one-size-fits-all' model on HoDs and the role they play in schools, and that context plays a big role here. Even the PAM document (DBE 2016:27) states that the job description of the HoD is individual and school-specific.

Amongst several job stressors researched on different management levels, role ambiguity ranks high as a job stressor experienced by mid-level managers (Sinha & Subramanian 2012:75). Nagar (2012:56) also acknowledges the fact that stress is related to role ambiguity and that role ambiguity exists when employees are uncertain of what is expected of them. Urien, Ossa and Garcia-Salmones (2017:142) add that the greater uncertainty there is about one's role, the less satisfied and more stressed employees are. Role ambiguity, as a job demand, leads to exhaustion and cynicism towards the fulfilment of the role, which in turn can negatively influence psychological well-being (Jackson & Rothmann 2005:119). The whole team climate is negatively affected by job demands and, more specifically, by burnout experienced by mid-level managers and, in this case, HoDs (Salmela-Aro & Upadyaya 2018:198). On the other hand, clear communication with regard to job expectations acts as a job resource (Diebig, Bormann & Rowold 2017:237). Heads of department also feel a deep sense of satisfaction when they are invited to be an active participant in the process of defining their roles, which in turn leads to their being more engaged in and committed to their roles (Kelley & Salisbury 2013:310). Role clarity, as a job resource, stands in opposition to role ambiguity - which is a job demand - and can combat the negative effect of role ambiguity (Van Wingerden et al. 2017:165). With most HoDs lacking a clear job description and with principals delegating tasks *ad hoc*, role ambiguity (as a job demand) may lead to poor engagement on the side of HoDs, while job clarity (as a resource) could go a long way in enhancing other job resources (Lillejord & Borte 2020:84).

Furthermore, in-service training and opportunities awarded to HoDs for professional skills development are stated as equally important job resources that will alleviate the pressure experienced by HoDs in their mid-level management position (Chilvers et al. 2018:438).

■ Research paradigm

The paradigm underpinning this study is the social constructivist worldview. This worldview stands in correlation to social constructivists who believe that individuals seek understanding of the world in which they live and work (Creswell & Creswell 2018:7). Furthermore, social constructivists, as researchers, work with research participants to construct knowledge and create a new reality (Lincoln & Guba 2013:41), and constructivist researchers seek to understand the world of lived experience from the perspective of those who live it (Walker 2015:37). This research is aimed at understanding the world and daily lives of HoDs as mid-level managers in education to holistically benefit both HoDs and schools. This was largely identified by the way in which they interpret their work circumstances, the roles they play in their surroundings and the researcher's interpretation of their recollections, hence the inclusion of the interpretivist paradigm in this study.

■ Research design and methodology

A qualitative research approach was adopted, which aimed at interpreting HoDs' experiences and understanding their worlds (cf. Gupta & Awasthy 2015:31–35). This study is grounded within phenomenology, with phenomenologists aiming to describe what all participants, and in this case HoDs in primary schools, have in common as they experience a specific phenomenon, which, for the purpose of this study, is role conflict and ambiguity (cf. Nieuwenhuis 2016:60). The reliability of interpretative research is embedded in the constant comparisons of findings in the attempt to identify possible phenomena that may appear. By interpreting the lived experiences of the different HoDs as recounted by them, the researchers could draw comparisons. Meaning was given to the phenomenon, with subjective conclusions drawn.

Convenient sampling was used to identify schools within the greater Tshwane area whose HoDs had the means to engage in online interviews. Five independent schools were identified – four located in urban areas and one in a township. Three public schools were identified, part of the Gauteng Department of Education and located within the Tshwane West and Tshwane North districts. Purposive sampling was used to identify participants. As the researchers aimed to identify the challenges experienced by and expectations placed upon HoDs within primary schools, they identified HoDs at different primary schools within the Tshwane area. Using the abovementioned criteria, the researchers narrowed the sample down to 15 participants, including seven Foundation Phase HoDs, four Intermediate Phase HoDs and four Intersen Phase HoDs, as set out in Table 8.1.

In line with what Leedy and Ormrod (2015:273) suggest for phenomenological researchers, the researchers of the current study relied exclusively on in-depth interviews with this selected sample of participants to collect data. Because of

TABLE 8.1: Participants.

HoDs	Participant classifications
Foundation Phase HoDs	FP-I1: Female, 10 years' experience, small independent school, wealthy area
	FP-I2: Female, 1 year experience, small independent school, middle-income area
	FP-I3: Female, 5 years' experience, rapidly growing independent school, low-income area
	FP-I4: Female, 13 years' experience, average-sized independent school, middle-income rural area
	FP-I5: Female, one and a half years' experience, small independent school, middle-income area
	FP-G1: Female, 15 years' experience, relatively large government school, middle-income area
	FP-G2: Female, 13 years' experience, small to average-sized government school, middle-income area
Intermediate Phase HoDs	IP-I1: Male, 7 years' experience, relatively large rapidly growing independent school, rural low-income area
	IP-I2: Female, 3 years' experience, rapidly growing independent school, low-income area
	IP-G1: Female, 11 years' experience, relatively large government school, low-income area
	IP-G2: Male, five and a half years' experience, relatively large government school, middle-income area
Senior Phase HoDs	ISP-I1: Female, 4 years' experience, small independent school, middle-income area
	ISP-I2: Female, 2 years' experience, small independent school, wealthy area
	ISP-I3: Female, 2 years' experience, average-sized independent school, middle-income rural area
	ISP-G1: Female, 1 year and 7 months experience, relatively large government school, middle-income area

Key: HoDs, heads of department.

the COVID-19 pandemic at the time, the researchers made use of digital online platforms for the interviews. The interviews were recorded to allow for transcription later, and the participants were informed of these recordings. Content analysis was adopted to analyse the data. The researchers followed an open-coding process, with no predetermined codes but emerging codes being identified as the content was analysed.

The researchers sought to give honest feedback on their findings at all times, and sensible coding of the transcribed data was verified by sharing the data transcripts with the participants for validation of their being true reflections of what the participants had shared and meant in the interviews. Permission was obtained from all the authorities involved with the DBE, approving the research to be conducted within the Tshwane North and Tshwane West districts. The necessary ethical approval for the research was obtained from the Research Ethics Committee of the university under whose auspices the research was conducted.

■ Findings and discussion

Particular themes have become evident regarding the challenges mid-level managers or HoDs in primary schools face in their attempts to manage their departments, the expectations placed upon them and, ultimately, the role conflict and ambiguity they experience. These themes are listed in the diagram presented in Figure 8.1.



Key: HoDs, heads of department.

FIGURE 8.1: Themes emerging from the research.

Next, the themes listed in the diagram are elaborated upon.

■ Challenges faced by and expectations placed on HoDs in primary schools

■ Work overload

The HoDs who were interviewed have been caught off-guard by the magnitude of the number of tasks they must perform and, coupled with that, the lack of time to perform these tasks, which often result in their personal lives being affected. It was described thus:

‘I never have time for anything [...] I am always on a guilt trip for not doing enough, due to not having enough time.’ (FP-I2)

This challenge of work overload and time constraints experienced by HoDs is also reflected in the literature, with Valadez-Torres et al. (2017:562) indicating that heavy workload and stress lead to emotional exhaustion, especially in the field of education and amongst mid-level managers. Viewed in line with the JD-R theory, Bakker and Demerouti (2017:277) list role overload as an example of a job demand. It should, however, be remembered here that job resources stand to counteract the negative effects of job demands. Jackson (2018:743) reports that organisational support has a positive effect on the attitude of employees, and this was called to mind with the following comment by a HoD:

‘The moment you want to fall into pieces, there’s so many people around [...] that’s why I love teaching, that’s why I love being here in this position [...] they are really supportive and help.’ (ISP-I3)

With the stress of work overload and a lack of time, HoDs find it hard to prioritise and risk starting to feel unaccomplished. They struggle to focus on completing their duties or tasks thoroughly, and in conjunction with their ambiguity about what exactly their role and duties entail, they end up doing a little bit of everything. This feeling is proven with ISP-I1 explaining her perception of her professional capacity as HoD as being a 'Jack of all trades, master of none'.

■ Authority or lack thereof

Heads of department experience role conflict in the sense of carrying the responsibility for their department but having limited power to really manage it. In making decisions, they are obliged to stay within the framework of the motto of the school and the expectations of both the DBE and the parents. Most decisions first need to be either discussed at the school management team level or approved by someone from the top management. ISP-I3 voiced this frustration as 'there's always a point of discussion somewhere [...] I don't feel free to just make decisions at this point'. Pepper and Giles (2015:46) also emphasise the fact that HoDs in higher education feel overwhelmed in their jobs, with a major sense of responsibility and yet, minor power, as they deem their position to merely be one to implement the decisions taken by the top management and not to bring about the changes they feel are necessary within their departments. In correlation with this, HoDs also find it hard to balance the expectations from the DBE with what is expected from the school itself and what they, themselves, know works well in practice. This is explained in the following statement:

'The department says one thing; your conscience says something else; and then there is also how something will work in practice and to manage that stress, that is quite a challenge.' (FP-I2)

A similar finding was made by Jackson (2019:1), explaining that in his time spent as an HoD in a secondary school, meeting organisational demands and the priorities of top management while also meeting the needs of the DBE was a daily balancing act. Considering that HoDs have experience within the field of education, and as seen in correlation with the JD-R theory, this feeling of a lack of authority and, ultimately, having role conflict within their management position is a job demand experienced by HoDs.

■ Academics

Heads of department regard it as their responsibility to see to it that the academics of the school is run according to the expectations of the DBE, and their principals expect them to play an active role in working towards the

provision of a high academic standard. Simultaneously, the teachers in a department have high expectations of their HoDs and expect them to be knowledgeable. At the same time, however, HoDs also expect a certain level of competence of their staff as qualified teachers and find the lack thereof challenging. In this, Mampane (2018:193) recognises the role of HoDs in the professional development of teachers. However, she also recommends that top management should support HoDs in this role and equip them with the necessary skills to recognise gaps in the competencies of the teachers in their departments. This suggestion is valuable, seen in the light that, despite their desire to capitalise on their strong points, HoDs find it hard to delegate and utilise teachers correctly. This is summed up in the following response:

'I wish I had more experience in psychology [...] you have to read the people [...] so that you know the people that you work with, and you must know which people to choose, to be your grade leaders.' (FP-14)

So HoDs are expected to take control of the academics within their departments in ensuring curriculum coverage. Bipath and Nkabinde (2018:7) also highlight the importance of HoDs staying abreast of the latest teaching and assessment strategies.

A factor that brought about additional challenges in 2020 was the COVID-19 pandemic. Heads of department faced challenges such as dealing with different levels of academic competence after the lockdown, the possibility of not being able to hold back learners if they did not meet the requirements for passing a grade, changes in the curriculum, a lack of adequate and timeous communication from the DBE and having to find creative ways to bring the curriculum content across to the learners. These culminated in a feeling of uncertainty experienced by HoDs, who, at the same time, were expected to take the lead.

Although it is not a frequent occurrence, the implementation of a new curriculum poses a challenge to HoDs. At the same time, the challenge of implementing a new curriculum was also explained as being fulfilling and rewarding, especially when met with a positive attitude. A participant explained:

'It's a challenge to work out a new curriculum [...] and everything from scratch [...] but it's very [...] rewarding [...] especially if you get your feedback from persons like [*name of district official at the DBE*] and they appreciate what you're doing.' (FP-14)

This recollection of both the challenge and the reward that the implementation of a new curriculum can offer is interesting and can be viewed against the JD-R theory. According to the JD-R theory, each occupation has its own negative or positive job-specific factors related to occupational well-being (Bakker & Demerouti 2007:312). The implementation of a curriculum and bringing a new curriculum to fruition in schools are part of an HoD's core duties and responsibilities but can also be job demand that requires effort. At the same

time, the task potentially promotes personal achievement, which is referred to as a 'challenge job demand' (Podsakoff et al., as cited by Bakker & Demerouti 2017:277). However, as in the case of the participating HoD who expressed fulfilment when she received positive feedback, this positive feedback, which serves as encouragement, also serves the purpose of a job resource.

■ Two chairs

All of the HoDs interviewed also stand in the class as teachers themselves. This brings about the added challenge of balancing teaching responsibilities with the various responsibilities and tasks of an HoD, which causes conflict amongst HoDs. Apart from the extra workload and the inevitable time spent after hours to complete all the administrative and academic duties of both HoD and teacher, HoDs also struggle and experience it as demanding to find time during school hours to fulfil tasks such as conducting class visits, mentoring teachers, addressing the behaviour problems of learners and so forth. This challenge is evident in the following explanation:

'As a head, you are expected to do your head's job and oversee and mentor and look after people, but then you also have your class [...] so it's just, it's time [...] when do you teach [...] when do you HoD [...] when do you lead your team at the same time?' (FP-13)

Within the literature, Modau (2004:7) recalls how he had struggled to manage the roles of being an HoD and an active teacher at the same time and that even though he still taught actively he had had to exercise a leadership role and take ownership of his department, all without the necessary guidance to do so. In line with this, it was found that HoDs lack the time to manage their departments and lead their subordinates because of the time spent teaching in the classroom (Bipath & Nkabinde 2018:7; Du Plessis & Eberlein 2018:13).

■ Mentorship

Almost all of the HoDs interviewed fulfil the role of being a mentor on some level. This may be because of the absence of senior and master teachers within schools. Some mentoring roles seem fitting for HoDs to execute, as conducting class visits and guiding staff with curriculum implementation are core duties of HoDs (DBE 2016:54). These include myriad mentorship roles, such as mentoring new staff, younger staff, student teachers and even current and older staff. However, several challenges accompany this mentorship role. To start with, the time it takes to do in-depth mentorship is seen as a challenge. Heads of department also find it challenging to mentor different staff members with their different personalities in different ways. This issue is explained:

'For me, the different personalities [...] to understand each person is quite difficult [...] because I think the main thing is just to understand each person as an individual and not, sort of, think you are all a group, and you are all the same.' (IP-G1)

The importance of HoDs being involved in the mentoring process is stressed by Mampane (2017b:129), who reports that HoDs who coach and mentor their staff appropriately successfully create long-term strategies to improve education. Collier et al. (2002:24) have also found that HoDs enjoy the role of mentoring and coaching their subordinates and can see the benefits thereof, with the only drawback being their lack of time. At least one participant, IP-I2, echoed these sentiments, relaying his feelings about his mentorship role: 'I think I like that [...] that's the teacher in me'.

■ Leadership

Leadership seems to be one of the grey areas in education, where at times it is recognised as an important duty of HoDs (Mampane 2017a:149), while it is neither stipulated as such in the PAM document nor are HoDs appraised for it as part of the Integrated Quality Management System (IQMS) instrument. Some of the HoDs interviewed mentioned that leadership was expected of them and that they realised the importance of fulfilling the leadership role. The following comment serves as proof hereof: 'You pull your whole phase with you [...] you are there as a leader [...] the phase will be as good as the phase head' (ISP-I1).

Considering the COVID-19 pandemic, it seems that the leadership role of HoDs has been revived and that, in the midst of this crisis, it was expected of HoDs to handle problems quickly and effectively and to set the pace to get through difficult circumstances. These expectations are clear in the following statement:

'I saw with COVID, now [...] they look up to you [...] some people [...] function very poorly under stress, and when there is so many new things and changes, some people just can't handle that [...] and seek definite leadership.' (FP-G2)

This role of leadership does not come without its challenges. Some staff members do not accept the authority of the HoD as a leader and challenge HoDs by questioning their decisions or their instructions. HoDs experience the nonacceptance of their authority negatively. This is linked to the literature that posits that HoDs who feel valued by the teachers in their departments will fare better in their roles for managing those teachers without being met with suspicion and disloyalty (Gjerde & Alvesson 2020:147).

The responsibility of leading others technically befalls master and senior teachers, according to the PAM document. However, in contrast to what is stated in the PAM document and more in line with Mintzberg's management role model that lists leadership as a managerial role (Stoner & Freeman 1989: 16–17), the participating HoDs confirmed during the interview process that the teachers in their departments expected them to lead them. The researchers have found that the HoDs view their leadership role as very important. They seemed proud of having to lead their departments, with obvious successes under their leadership going a long way in acting as a job resource. This rings

true when compared with Du Plessis and Eberlein's (2018:11) findings that more successful education systems are evident in schools with more distributed leadership, which includes HoDs leading their departments.

■ Extramural activities

Even though the literature indicates that extramural activities are a heavy burden on HoDs, it seems that schools are actively trying to lighten this load for HoDs and that these activities are more academic in nature, which is exactly in line with stipulations in the PAM document (DBE 2016:36). With schools trying to lessen the extramural load on HoDs, conflict can be expected, as HoDs are appraised according to their involvement in extramural activities. To achieve an outstanding outcome during their appraisal, HoDs must be actively involved in these activities (Education Labour Relations Council 2003:38-39). It can be beneficial if principals explained that these extramural activities could be more academic in nature.

It is worth mentioning that three participants indicated that they were actively involved in the organising and coaching of various sports and extra-curricular cultural activities, but that it was not expected of them and that they did it by choice. ISP-13 explained: 'I'm also involved in extramurals [...] I don't think it is expected of me [...] but I do like it'. The observations made in relation to the expectations of HoDs' involvement in extramural activities during the interviews seem to contradict the literature surveyed. Collier et al. (2002:24) and Du Plessis and Eberlein (2018:13) have found that HoDs report feeling over-burdened by carrying the load of being involved in extra-curricular activities and that HoDs are involved in rigorous extramural programmes.

■ Overlapping of roles

Heads of department feel frustrated with the overlapping of roles and tasks amongst management members, which adds greatly to their sense of role conflict and role ambiguity. Although they acknowledge feeling empowered when they perform duties meant for top management, a clear understanding of what is expected of them remains a major concern. This was voiced thus:

'The PAM document [...] it says things under the principal, but it also says it under the deputy, and it also says it under the HoD, so what part of that must I do [...] what part does the deputy do and what part does the principal do?' (IP-G1)

This overlapping of roles is apparent in the explanation of the core duties and responsibilities contained in the PAM document (DBE 2016:36-44), with several overlapping administrative, personnel-related, academic and communication tasks. Job demands, such as this confusion in terms of

knowing exactly what is expected of one, have a negative effect on work engagement. In contrast, positive events in education, such as a clear explanation of expectations, turn job demands into job resources, helping employees, and in this case HoDs, to remain engaged (Kraimer et al. 2019:149). Clear communication from top management has also been found to be a job resource (Diebig et al. 2017:237), and thus, clear communication from principals with regard to what is expected of their HoDs, especially in roles overlapping with those of their superiors, will go a long way.

■ Position in the middle

The position of HoDs in the middle between top management and general staff creates a lack of a sense of belonging. Heads of department are also placed in an uncomfortable position when they know that a decision made by top management can affect the staff negatively. The challenge of not knowing where one belongs as an HoD, with the added challenge of assuming the role of protector, was explained thus:

'It is sometimes difficult if you feel the principal made a decision that might put the teachers at a disadvantage, but our relationship is very open, so I think it is necessary to sort out anything coming up straight away and talk it out.' (FP-12)

In line with what FP-12 relayed, Gjerde and Alvesson (2020:144) have found that despite holding the teachers in their departments accountable, HoDs are prone to take on the role of protector and almost fill the role of a parent to them – offering advice, care and protection, sometimes even from top management. Similarly, Hinson-Hasty (2019:131) reports that juggling the task of being the faculty advocate for their department and being there to meet their employees' needs, as well as implementing the visions and plans of top management, regardless of how these affect the working-class employees, is a job demand that HoDs often struggle with. It is also important to note here that an open-door policy from the principal's side to address issues makes HoDs feel more at ease with having to implement the things expected by the said principal. This is in line with the finding that with supportive behaviour and clear communication from top management as resources (Diebig et al. 2017:237), this job demand of implementing ideas from top management can be combatted (Nixon et al. 2011:13).

The position of being in the middle has also brought HoDs to the point of being unsure of where they fit in, as the following comment explains: 'It's a very lonely position to have [...] it's a little bit of management and also a little bit of still being a staff member' (ISP-13). This response serves to prove the role conflict HoDs experience in having to play the roles of both a leader and a subordinate at the same time, as mentioned by Anicich and Hirsh (2017b:3).

■ Not having a voice or being overlooked

Some HoDs reported frustration in feeling that they did not have a voice or that their opinions did not count. They feel they are overstepping boundaries in voicing their opinions, yet they feel they should have a voice as the HoD. While not all top management-level employees are reported as making HoDs feel this way, there certainly are some top managers who cause this kind of role conflict. The following was noted:

'I know that I am a creative thinker [...] you want to put your opinion on the table [...] why am I an HoD if I keep quiet [...] I thought that we would all work together and we would listen to one another's ideas, and we would learn from one another.'
(IP-G2)

This relates to Mampane's (2017b:132) explanation that empowered HoDs are independent thinkers, which is an important quality of entrepreneurship. Then again, it seems as if the mindset of the principal of a school determines the involvement of HoDs in the strategic planning process of a school (Myende & Bhengu 2015:642). Seen in conjunction with the JD-R theory, Kwon and Kim (2020:13) have found that engaged employees act more innovatively and cope better in facing challenges (a job demand), hence engagement being identified as a job resource, and it is thus worth giving HoDs a voice within the management structure of a school.

In this instance, the researchers value the role principals and their management style play in the voice HoDs. Some of the HoDs mentioned that their principals appreciated their being innovative. From the following response, it can be noted that HoDs' freedom differs from school to school:

'In the previous school, I had a lot of freedom [...] I could literally pretty much do what I wanted with my phase [...] at this point, I think because there is so much red tape in this independent school, you don't really have that much freedom [...] I'd rather go to my principal first [...] before we do anything.'
(FP-13)

An added challenge creating conflict in this regard occurs when more than one top manager is present at a school and the HoD receives conflicting answers from the different members of top management. They are conflicted when they feel that one member trusts them more while the other still feels the need to micromanage them. This ties in with the belief that while it is expected of mid-level managers to be more innovative, micromanaging top managers often derail their attempts or dismiss their good ideas (Ashford & Detert 2015:73). This correlates with the finding by Caughron and Mumford (2012:351) that a coercive leader leads to the HoD losing confidence and acting in an insecure way, whereas a principal who involves HoDs in decision-making processes creates a common vision, as explained by Myende and Bhengu (2015:641).

It became clear from the interviews with the Foundation Phase HoDs that they felt overlooked and as if they had reached a ceiling in their growth, as Foundation Phase HoDs seldom get appointed to top management positions. This causes role conflict, with Foundation Phase HoDs working as hard as their fellow Intermediate and Senior Phase colleagues yet possibly not getting the same opportunities to develop. This feeling was vocalised thus:

‘A Foundation Phase teacher [...] even though you are exactly the same post level as the seniors [...] does not necessarily get accepted as being that high [...] it sometimes seems as if you are being looked down upon. I have been for a couple of interviews [...] for deputy principal positions and they will always appoint a senior person.’ (FP-G2)

Even though the researchers failed to find literature to substantiate this statement, it has been noted that the minimum requirements posted in advertisements for the position of primary school principals specifically state that candidates qualified in the Intermediate and Senior Phase fields should apply. Thus, there is reason to believe that this feeling of being overlooked is justified, and this phenomenon could be worth investigating in the future. Razzak (2015:12) identified the innate desire within HoDs to grow within themselves and move up the career ladder to satisfy their personal ambition, and if this opportunity is not present, it may cause conflicted feelings.

■ Knowledge of position

HoDs experience insecurities in their positions, and while they are often unsure of how to manage their departments, they feel it is necessary to keep up appearances, as it is expected of them to be knowledgeable, and they do not want to seem weak or insecure. This situation of keeping up appearances was explained in the following way:

‘The poker face that you keep [...] everything seems calm, but in the meantime [...] you know that cartoon picture of the duck on the pond [...] all calm [...] but underneath their feet are kicking like mad [...] that was it [...] no in-service training [...] nothing.’ (FP-G2)

This response mirrors the findings of Nkabinde (2013:104), who states that while it is widely accepted that HoDs should manage their departments, they are often unsure of what the job entails. Within the framework of the JD-R theory, this kind of role ambiguity is regarded as a job stressor, which is a job demand (Bakker & Demerouti 2011:4). Jackson and Rothman (2005:119) point out that role ambiguity as a job demand leads to exhaustion and cynicism, which in turn can influence psychological well-being, which is linked to the stress HoDs experience because of the uncertainty of what their roles entail and the concurrent pressure of keeping up appearances. The insecurities of their duties were explained: ‘I don’t know where my duties start and where it ends ... that is something I would like to know’ (IP-G1).

None of the HoDs interviewed recalled having had any extensive training before taking up the position of HoD or even thereafter. As newly appointed HoDs, most of the participants did not know what was expected of them. The general assessment was that they had to learn things by themselves, and they had to learn it quickly, with FP-G2 explaining it as being a 'crash course', FP-I2 describing it as 'you just oftentimes trial and error' and IP-G1 adding 'what I did, I did by myself'.

The lack of training and preparation for the role of HoD is also recognised in the literature. Du Plessis and Eberlein (2018:11, 14) point out that HoDs do not receive the necessary training to enhance professional development and fulfil their roles successfully. Role ambiguity has been classified as a job demand hindering employees from fulfilling their jobs to the best of their ability (Bakker & Demerouti 2017:277). This is linked to emotional discomfort in that workers are less satisfied and more stressed with the presence of uncertainty about tasks and roles (Nagar 2012:56). Block (2014:33) has also found that job uncertainty, more than anything else, causes discomfort for HoDs and is the biggest contributor to their unease. True to the nature of the JD-R theory, where job resources and job demands should be seen in correlation to one another, it is worth noting that role clarity (or training, in this instance) as a job resource stands in opposition to role ambiguity as a job demand, and that it can combat the negative effect thereof (Van Wingerden et al. 2017:165).

■ Conclusion

This research investigated the challenges faced by and the expectations placed upon HoDs as mid-level management in primary schools and explored the factors contributing to these HoDs experiencing role conflict and role ambiguity. It has been found that HoDs in primary schools face numerous challenges in the execution of their daily tasks. They also have many expectations placed on them from a variety of sources. These challenges and expectations, together with many other factors, contribute to HoDs experiencing role conflict and role ambiguity, which in turn makes it hard for them to function and fulfil their role to the best of their ability. It seems that HoDs in primary schools have much to offer in terms of management, but several obstacles curb them. They are underutilised as managers, while they have the potential, with their experience and expertise, to play a bigger role in this regard. These obstacles in the form of challenges and expectations, as well as role conflict and ambiguity, are all job demands that have a negative impact on the functioning of HoDs. However, the research also highlighted aspects to counteract the job demands and delved into specific actions of

various stakeholders that could serve as job resources for HoDs to be fully functional and be utilised successfully. It is worth exploring job resources that will positively impact HoDs to eliminate or reduce the effect of their job demands and to have HoDs emerge as fully functional managers within the primary school system.

Understanding the instructional leader's role of HoDs at parallel-medium primary schools

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■ Abstract

Legislation regarding education in South Africa has changed significantly since 1994. One aspect that has changed is language policy and the language of learning and teaching at schools. The number of schools that have changed their language policy from single-medium to parallel- or dual-medium has increased significantly. This change has also had an impact on the management of schools. The HoD as an instructional leader in their department plays an important role in managing this change. This research aimed to investigate and describe the instructional leadership role of HoDs at parallel-medium primary schools. Furthermore, the study

How to cite: De Beer, ZL 2022, 'Understanding the instructional leader's role of HoDs at parallel-medium primary schools', in L van Jaarsveld, CC Wolhuter & CP van der Vyver (eds.), *Education Leadership: Scoping, perspectives and future trajectory*, AOSIS Books, Cape Town, pp. 161-181. <https://doi.org/10.4102/aosis.2022.BK383.09>

also focused on the impact of the leadership role of HoDs when the language policy at their schools changed. With a focus on instructional leadership of the HoDs, this case study investigated the challenges experienced by HoDs. The study was conducted at three parallel-medium primary schools in Pretoria. It is a qualitative study that interprets the data collected by means of three techniques. The three data-collection instruments were observations, interviews and document analysis. The data were analysed using content analysis. These findings indicate, firstly, that a school's language policy significantly influences the instructional leadership of HoDs at parallel-medium schools. Second, and more specifically, the HoDs should implement tasks and duties in both languages of learning and teaching. This implies a tremendous increase in their workload, which includes planning, meetings and communication. Lastly, legislation and case law form the framework within which the HoDs as teaching leaders must fulfil their tasks. It seems that the participants in the study have limited knowledge of the legal framework.

■ Introduction

The political landscape of South Africa has changed completely since democracy was enacted in 1994. Article 9(3) of the *Constitution of South Africa* (Republic of South Africa [RSA] 1996a) (hereinafter 'the Constitution') spells out the responsibility of the state regarding discrimination - the state may not directly or indirectly unfairly discriminate against someone on one or more grounds. In South Africa, there is a uniform education system that may not discriminate on any grounds, as specified in the Constitution. For example, South Africans cannot be unfairly discriminated against based on gender, race or language. There are no schools where learners are separated by race. So parents can enrol their children in schools to which they did not have access in the apartheid era, because race and language may no longer be used as an admission requirement. Consequently, several schools have had to change their language policy to accommodate all learners.

The *Western Cape Minister of Education v the Governing Body of the Primary School Mikro 2005* 10 BCLR 973 (SCA) and *Middelburg Primary School v the Head of the Mpumalanga Department of Education (2003)* 4 SA160 are examples of court cases in South Africa about language policy. These court cases highlighted the issue of language as the medium of instruction. The Afrikaans single-medium schools in Gauteng had decreased from 274 in 1999 to 155 in 2003 (Du Plessis 2003). The changes in the

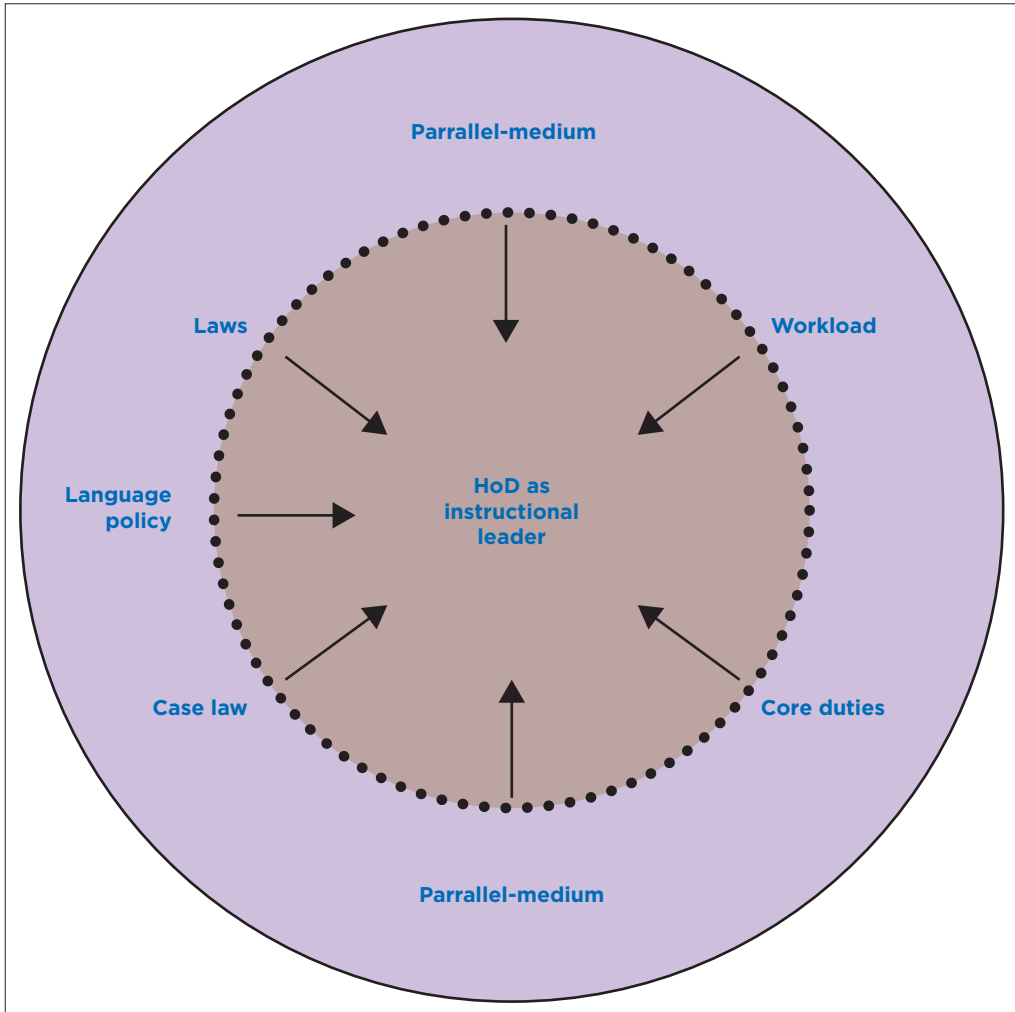
language policy of schools have had an impact on the management of schools, specifically on the management of the curriculum, because the language of learning and teaching (LoLT) has changed. Heads of department are the teaching leaders in their schools and departments and must provide the necessary guidance regarding the adjustments and changes in respect of the LoLT.

In 2016, one of my colleagues was transferred to a parallel-medium primary school. He had 19 years of teaching experience at a single-medium Afrikaans school. Although he had nine years of experience as HoD, he was uncertain in his new role as leader and manager of a department at a parallel-medium school. Each management document had to be translated from Afrikaans to English and vice versa. These included policies, planning, assessment, curriculum content and communication with parents, staff and learners, to name but a few. He informed me that he then worked twice as hard as previously and that the double workload caused extra work pressure. He was also uncertain about his own and the teachers' language skills, especially in English, as teachers were expected to be able to teach in Afrikaans and English. Teachers who are not fluent in Afrikaans and English have an impact on learners' achievement. Some learners complain that they do not understand what the teachers try to explain. For instance, a Mathematics teacher having to teach in two different languages can lead to nonstandard teaching, especially if the teacher is not equally fluent in both languages. It is difficult for teachers to teach in a language in which they are not proficient.

In 2008–2009, I graduated with an Advanced Certificate in Education Management. I was exposed to a variety of views and problems faced by HoDs at their various schools. At some schools, mother tongue instruction ends in Grade 3, and from Grade 4 the LoLT is English. My Zulu- and Tswana-speaking colleagues struggled with translation and explaining concepts in English. This experience led me to the following question: what is the influence of the change of the language policy at a school on the management task as a teaching leader of a HoD?

Another interesting phenomenon is the 'two schools on one site' system. Some schools actually operate two schools on one site. There is an Afrikaans section and an English section, but the same teachers must teach in both streams.

■ State of the art



Source: Adapted from De Beer (2021).
Key: HoD, head of department.

FIGURE 9.1: The theoretical-conceptual framework.

■ Legislation and the HoDs

All the role players in the South African education environment are regulated by relevant legislation. This includes the *Constitution of the Republic of South Africa* (RSA 1996a), the *Schools Act* (RSA 1996b), the *National Education Policy Act* (RSA 1996c), the *Employment of Teachers Act* (RSA 1998) and the PAM (RSA 1999). Heads of department as teaching leaders should be aware of the legislation regulating their profession in general and the relevant rules, regulations and measures according to which they must manage their departments in particular.

■ Jurisprudence and the HoDs

The following court cases are related to the research reported on in this chapter:

- *The Western Cape Minister of Education v the Governing Body of the Mikro Primary School* (2005) 10 BCLR 973 (SCA).
- *Middelburg Primary School v the Head of the Mpumalanga Department of Education* (2003) 4 SA160.
- *Mpumalanga Department of Education and Another v Ermelo High School and Another* (CCT40/09) (2009) ZACC 32.
- *Seodin Primary School and Others v MEC of Education Northern Cape and Others (2)* (77/04/01) (2005) ZANCHC 6; 2006 (4) BCLR 542 (NC).

Jurisprudence forms part of the sources of the law. This case law influences the workload and the leadership role of the HoD as a teaching leader. All the above cases concerned schools where the language policy had changed. The language policy of the schools had been changed by the relevant education departments from a single-medium to a parallel-medium school.

■ Language policy and the HoDs

When a single-medium school is changed to a parallel-medium school, the role of the HoD as a teaching leader is affected. Parallel-medium schools are schools in which two languages are used in separate classes (Oxford Language 2021). So there are effectively two sections in one building, where one stream receives instruction in one LoLT and the other stream in another LoLT. The HoD as a teaching leader in these types of schools experiences unique challenges, as all the management and leadership tasks and functions must be executed in two languages.

■ Core duties and workload of the HoDs

The *Personnel Administrative Measures* (2012) (hereinafter 'PAM') of the Department of Education gives, amongst other things, the basic job description of each post level in education. Heads of department must be teaching between 85% and 90% (Section 3.3 of PAM) of the time. Article 4.4 of the PAM refers more specifically to the duties and responsibilities of the HoDs. The HoD is the teaching leader of the specific department; it can be subject-orientated, learning-area-orientated or phase-orientated. Ali and Botha (2006) describe the role of the HoD as monitoring the teachers' records, direct observation of the teacher when giving class, goal planning for improvement in departments and the evaluation of learners' results.

■ Core duties at a parallel-medium school for an HoD

This study can identify possible gaps with regard to the HoD as a teaching leader at parallel-medium schools in the literature supplement. It is important to note that the workload of an HoD at a parallel-medium school differs from the workload of an HoD at a single-medium school. The school's language policy and legislation interpretation influence this teaching leadership role. In 2003, the Afrikaans single-medium schools had decreased from 274 in 1999 to 155 (Du Plessis 2003). HoDs therefore have to manage executing all tasks in two languages at these parallel schools. In their comprehensive literature study, Bush et al. (2006) conclude that limited material exists on the management of teaching and learning for HoDs at parallel-medium schools in South Africa. According to Bush et al. (2006), there is no literature on how principals and school managers use teaching leadership in their schools to promote effective teaching and learning. Hoadley and Ward (2008) say that knowledge of how principals manage the curriculum in South Africa is limited. However, there is ample international literature on the topic of teaching leadership. Hoadley and Ward (2008) define teaching leadership as the relationship between curriculum and leadership. Heads of department as teaching leaders must effectively manage the curriculum in their departments. According to Jenkins (2009), teaching leaders set clear goals, allocate resources for teaching, manage the curriculum, monitor lesson planning and evaluate teachers. Flath (1989) states teaching leaders make teaching the number one priority of the school. Teaching leaders should have the following skills: interpersonal skills, planning skills, teaching skills, research skills and evaluation skills (Lashway 2002)

'Teaching leadership contains the actions that the principal initiates or delegates to promote growth in learner learning' (Debevoise 1984:14). Wildy and Dimmock (1993) also list the following tasks of teaching leadership: defining the purpose of school education, setting whole school development goals, providing resources for learning, evaluating and supervising teachers, coordinating staff development and creating collegial relationships with and amongst teachers. As can be seen from the literature, there is no single overarching definition of teaching leadership but several different ones. The lack of consistency in definition can be a problem. As Cuban (1984:132) says: 'Road signs exist, but no maps are yet for sale'. This study focuses on the experiences of the HoD as a teaching leader at parallel-medium primary schools. The definition of Ali and Botha (2006) is sufficient for the study; it effectively describes the role of the HoD as monitoring teachers' records, direct observation of teachers when giving class, goal planning for improvement in departments and the evaluation of learners' results.

■ Parallel-medium

The environment in which I conducted the research was parallel-medium primary schools. I selected three primary schools that followed this language policy in their schools. These schools offer two or more languages of instruction and learning, where different learners in different classes in the same grade receive instruction in two different languages. The language policy of a parallel-medium school has an influence on the HoD's task as a teaching leader.

The background of this study indicates that the language policy of a significant number of schools has changed from single-medium (Afrikaans) to parallel-medium (Afrikaans–English). This change has had an impact on the HoD's management and leadership role. A qualitative case study was used to gather data from three Afrikaans-speaking HoDs. Three primary schools where the language policy has changed from single-medium to parallel-medium were selected as a targeted sample. Aspects such as legislation, case law, language policy, duty, parallel-medium and instructional leadership were examined in the study.

■ Research design and methodology

Qualitative research is interpretive, naturalistic and inductive in approach (Creswell 1998). Nieuwenhuis (2019) states that all qualitative research is naturalistic and focuses on natural settings where interaction occurs. According to Nieuwenhuis, this implies that one views social life in terms of processes that occur instead of static terms. One of the paradigms associated with social qualitative research is interpretivism. This research is grounded in interpretivism. According to Rubin and Babbie (2009), interpretive researchers try to interpret and subjectively understand people's lives, actions, behaviours and perceptions. Interpretive researchers visit and explore individuals in their natural environment and try to make the reader of their reports understand what it feels like to walk in the shoes of the limited number of people they study. Cohen, Manion and Morrison (2007) define interpretivism as striving to visualise situations through the eyes of the participants. It reflects on the social interaction amongst people in their natural environment, describes the meaning people give to social interactions they observe and is descriptive in nature. Researchers' aim with the interpretive method 'is to investigate perspectives and shared opinions and to gain insight into situations, such as at schools and in classrooms' (Wellington 2000:16).

The HoDs were observed in their natural environment so that factors that could influence their teaching leadership could be noted. Therefore, rich, descriptive data were obtained by visiting the HoDs in their natural work environment. I documented and interpreted their experiences and realities.

Knowledge was thus acquired through direct and indirect interaction between the participants and me.

The purpose of this research was to describe the experiences of HoDs as teaching leaders at parallel-medium schools.

■ Research design

In this part of the report, 'case study' is defined, and the rationale for utilising this research design and method to answer the research questions is elucidated. Nieuwenhuis (2019) summarises a case study as the development of an in-depth understanding of a single case or multiple cases where multiple data sources (documents, archival records, interviews, observations and physical artifacts) are used. The sources of data are then analysed to describe the case or cases. Shen (2009:23) agrees with Nieuwenhuis and states that the 'purpose of a case study is not to represent the world but to represent a case'. Bromley (1991) defines a case study as a systematic investigation of an event to describe and explain the phenomenon. Moreover, Cohen et al. (2007:254) say that case study research 'involves the observation of a case or phenomenon in the real-life context'. Wallace (1998) suggests that the purpose of case study research is to solve specific problems, apply theories in practice and generate hypotheses. I utilised a case study approach to explore the role of the HoD as a teaching leader at parallel-medium schools.

Merriam (1988) describes a qualitative case study as an intensive, holistic description and analysis of a single entity, phenomenon or social unit. Case studies are descriptive and heuristic and rely heavily on inductive reasoning when dealing with the data. As this research dealt with the teaching leadership role of HoDs at parallel-medium primary schools, I was convinced that a case study would answer the research questions. The observation and interviews with HoDs in their natural environment at their schools brought me closer to their world and their interpretation of it. Three HoDs were visited, observed and interviewed, and relevant documents were analysed to understand how these HoDs managed and lead their departments with a focus on teaching leadership.

■ Research questions

The following research questions related to my research:

- What are the specific management and leadership challenges for an HoD at a parallel-medium primary school?
- What is the impact of language policy change on the teaching leadership role of the HoD at a parallel-medium primary school?
- How does legislation and case law on language policy affect the teaching leadership role of the HoD?

Case study research was deemed the best and most appropriate research method to investigate the phenomenon of the HoD as a teaching leader within the school and classroom context. One cannot study HoDs out of context. Teaching leadership in parallel-medium schools is part of the daily leadership and management tasks of the HoD, and therefore, the phenomenon must be studied in its natural situation. According to Stake (2008), qualitative case studies are characterised by a researcher who spends a great deal of time on the site and is in personal contact with the participants and their activities.

■ Research site

The research was conducted at three different parallel-medium primary schools in the Tshwane area. Financial considerations greatly contributed to the decision to choose schools near my place of residence. However, I did not know the participants at the selected schools where the research was conducted. It was important to visit the participants at their workplace while engaging in tasks related to their role as teaching leaders in their respective departments. The three schools are all well maintained, and there are enough teachers and adequate teaching and learning materials. Access to the schools and permission to conduct the research was gained without any problems. The management of the school was positive, and the participants were approachable.

■ Sample and participants

Purposeful sampling was utilised to select participants who could address the research questions. Nieuwenhuis (2019), Cohen et al. (2007) and Patton (2002) note that purposeful sampling is a feature of qualitative research and that the aim thereof is to select groups or subjects that display variation on a particular phenomenon. The selected participants must answer the specific research needs. In this case, three HoDs at three different parallel-medium primary schools in and around Pretoria were selected.

The participants came from three primary schools, and the criteria for selecting them were:

- School A: A HoD between the ages of 25 and 30 years in the Senior Phase who is responsible for the learning areas of Afrikaans and English.
- School B: A HoD between the ages of 30 and 45 years in the Senior Phase responsible for the learning area of Mathematics.
- School C: A HoD between the ages of 30 and 50 in the Senior Phase with several learning areas.

Initially, the gender of participants was a criterion for the sample, but I left it out because it is irrelevant to the research. The three participants included two men and one woman.

The first participant is a 44-year-old man who teaches Grade 6 Mathematics in Afrikaans and English. He has 21 years of teaching experience and has been an HoD for ten years. He has a professional teaching qualification and a further diploma in education management. The second participant is a woman with 19 years of experience. She has a professional teaching qualification and is working on an honour's degree in education management. She teaches a variety of subjects in both Afrikaans and English. The third participant is a man who is 30 years old. He also teaches a variety of subjects in both Afrikaans and English. He has eight years of teaching experience and has been an HoD for three years.

■ Data collection

The data-collection methods most used in qualitative research can be classified into three broad categories: in-depth interviews, observation, and document analysis and review (Nieuwenhuis 2019). All three of these qualitative methods were used to collect data in this study, which made the data more valid and credible. Observing the three HoDs in the class situation was the initial data-collection tool. Semi-structured interviews were then used to collect data from the three participants. Further analyses of their work documents such as planning files, assessment files, minutes of meetings and other relevant documents were utilised as well. The focus was on the teaching leadership role of the HoD in a parallel-medium primary school, considering the relevant legal framework and case law.

■ Observation

Nieuwenhuis (2019) explains observation as an everyday activity where one uses one's senses (see, hear, smell, touch and intuition) to collect data. The researcher documents what they experience and see. Data obtained via observation are verbal and nonverbal. The participants are also observed in their natural environment. About qualitative observation, Constable (2005) says that this explains the complexity of individual behaviour. The data cannot be generalised to the general population, and the presence of the researcher may influence the participants.

In this study, I wanted to observe three HoDs in their classes while offering a lesson in both teaching and learning languages. As teaching leaders, HoDs must implement and manage the curriculum. According to Cohen et al. (2007), the most outstanding feature of observation is that the researcher can collect data in natural social situations. The purpose of the observation was to observe the HoD as a teaching-learning facilitator in his class while teaching. I observed three HoDs in their classes. The observations each lasted 35 min. I used an observation template with the following headings: discipline, verbal communication, nonverbal communication, language use, leadership, language proficiency, planning and preparation and 'open' observations.

■ Individual interviews

Initially, I conducted trial interviews with colleagues at my school, which helped to identify questions that were not relevant and did not contribute to answering my research questions. I used semi-structured interviews, focusing on the teaching leadership of HoDs in parallel-medium primary schools. Nieuwenhuis (2019) describes an interview as a two-way communication where the researcher asks the participant questions so that data can be collected related to their ideas, views and opinions. A semi-structured interview is fluid; there is room for new questions as the interview progresses. The interviewer uses a general framework that serves as a starting point (Lindlof & Taylor 2002). My research included concepts such as legal framework, teaching leadership, parallel-medium schools, language policy, duty statement and the workload of the HoD. Nieuwenhuis states that semi-structured interviews are commonly used in research projects to amplify other data. The interviews in this research followed after the observation in the classrooms were conducted so that data from the interviews could enhance the observation data.

■ Types of documents and document analysis

Bowen (2009) describes document analysis as a systematic process of studying and evaluating printed and electronic documents. These documents consist of words and pictures recorded without the researcher's intervention or presence. Atkinson and Coffey (1997:47) refer to documents as 'social facts' that are produced, shared and used in socially organised ways. Nieuwenhuis (2019) highlights the following criteria for selecting documents: the kind of document, the publication date, whether the document was based on empirical research or opinions, the purpose of the document, the main point related to one's research and the research methodology used. The following documents related to the research were chosen according to the criteria mentioned earlier:

- *Constitution of South Africa* (RSA 1996a).
- *South African Schools Act* (RSA 1996b).
- *National Education Policy Act* (RSA 1996c).
- *Personnel Administrative Measures* (RSA 1999).

The documents included minutes and agendas of staff meetings and planning, assessment and learning area meetings as used by the three HoDs. These documents from the past two years were selected to be analysed. The document analysis focused on the HoDs' teaching leadership in parallel-medium primary schools. I decided to use working documents that highlighted the experiences of the HoD as a teaching leader in a practical, natural context. The documents included planning forms, assessment forms, textbooks, minutes of meetings (phase, learning area and staff meetings), worksheets and circulars

to parents. I kept the forms for the three participants in a safe place and assured them that the analysis would focus on their workload, duty and language and not on their personal abilities as teachers. They were assured that their identities and the names of their schools would not be disclosed.

According to Yin (1984), documents come in different formats and are relevant to any case study topic. Flick (2014) and Mayring (2014) define content analysis as a rigorous and systematic procedure to analyse and examine the data's content.

■ **Credibility**

■ **Observation and credibility**

It was important in this research that observations had preceded the interviews. New questions could emerge from the observation and be used in the semi-structured interviews. Both verbal and nonverbal communication forms part of the data. Cohen et al. (2007) point out the following threats when using observation: firstly, participants may act differently in the presence of the observer; and secondly, the researcher may become too involved with the participants.

■ **Interviews and credibility**

An important principle with regard to credibility and reliability is whether the questions asked will provide the desired answers (Cohen et al. 2007). Another practical method of promoting credibility involves reducing bias. With regard to credibility and impartiality during interviews, Cohen et al. warn about the following issues:

- the attitude, opinions and expectations of the interviewer play a role
- the interviewer tends to ask questions about their preconceived notions
- the interviewer may interpret the participants' answers wrong
- the participant may misunderstand a question and not interpret it correctly.

■ **Document analysis and credibility**

Weber (1990) points out that a document can highlight some points or underemphasise others. Cohen et al. (2007) mention the following problems regarding document analysis:

- the document is too short, biased, incomplete or inaccessible
- classification is not constant
- words can have different meanings in different communities
- coding and categorisation can lead to the loss of meaning of the rich descriptive nature of words.

The benefits of document analysis are that it is very effective because it takes less time, it is about selecting data and not collecting data, documents are not affected by the research process and they are stable, precise and have wide coverage over time and events (Bowen 2009). Bowen also addresses the following limitations of document analysis: the documents were not compiled for research, sometimes it is difficult to get hold of the necessary documents and documents can sometimes be withheld and not made available. I agree that the analysis of documents presents some challenges, as mentioned above. The biggest advantage, however, is that the credibility of the research has been increased as three data-collection methods were used.

■ Data analysis

Flick (2014) and Mayring (2014) define content analysis as a rigorous and systematic procedure to analyse and examine data and verify the content of the data. Cohen, Manion and Morrison (2007) describe the data analysis process thus:

- Describe the research questions that the content analysis must address.
- Describe the units that are analysed.
- Decide on the codes that will be used for the analysis.
- Decide on the categories for analysis.
- Code and categorise the data.
- The data analysis is then done.
- Make a summary.
- Draw possible inferences.

Content analysis was used to analyse the data collected for this study. Content analysis includes document analysis. Neuendorf (2002) describes content analysis thus:

Content analysis is a summarizing, quantitative analysis of messages that relies on the scientific method (including attention to objectivity, intersubjectivity, a priori design, reliability, validity, generalizability, replicability, and hypothesis testing) and is not limited as to the types of variables that may be measured or the context in which the messages are created or presented. (p. 10)

Content analysis in this research involved the analysis of data in the form of interviews, observations and documents. The data categories for this study were parallel-medium, teaching leadership, legal framework, management, HoD, language policy, duty statement and workload.

■ Ethics

The Gauteng education department granted permission to conduct research at the three schools. I also obtained permission to conduct the research from the schools and the participants. The letter directed at the participants to

request permission for the study explained to the principals and the HoDs that the names of the schools and the identities of the participants would not be disclosed. The research could be sensitive because observations and interviews were conducted, and school documents were analysed and used in the data collection. The participants were assured that the data would be kept confidential. The University of Pretoria (UP) granted me ethical clearance to complete the research according to some prerequisites.

■ Limitations of the study

One limitation of this study is the fact that the findings cannot be generalised, as the observation and interpretation of this reality could be subjective. The other limitation is that access to sources such as books, journals and so forth was limited.

■ Data analysis

HoD A is a teaching leader at a parallel-medium primary school.

■ Focus A: Observation in lass

HoD A's class was neat, with relevant classroom decorations for the learning areas she was responsible for. There was an academic atmosphere in the classroom. Discipline was maintained without affecting the learners' human rights. Although HoD A's mother tongue is Afrikaans, she is fully bilingual and speaks English very well. English is the second language of all the learners in her class.

For the first academic period observed, the medium of instruction was English. A social science learning opportunity about weather patterns was lectured by HoD A. The learners mixed their languages during teaching and learning, for example, *'Is jy mal?'* [Are you crazy?] and *'Eish, maar moenie worry nie, my huiswerk sal gedoen wees'* [Eish, but do not worry, my homework will be done]. The explanation of learning content is written on the blackboard in both languages (Afrikaans and English). The space on the board was limited because the content of one learning instruction should be displayed on the board in both languages. The planning is done in full in two languages.

The second academic period that was observed was a learning opportunity about intensive forms in the learning area Afrikaans Home Language. The period lasted 60 minutes (two 30-minute periods). The learners mixed their language, such as when one apologised, 'Sorry, Teacher, our car did not want to start'. HoD A did informal assessment and moved through the class. She was well prepared, and her confidence in herself indicated her professionalism as a teaching leader.

The topic of the third academic period observed was weather patterns. The LoLT was English. Once again, HoD A's English was excellent, although she sometimes used Afrikaans when she reprimanded learners – '*Genade maar jy skryf lelik, sussa!*' [Oh, my goodness girl, your writing is bad!]. One of the learners told me: 'If the teacher starts to speak in her own language, we know she is cross, and we must listen'. The planning for each of the three lessons observed was done in two languages. The learning content was also duplicated in both languages.

■ Focus B: Individual interview

HoD A has a Higher Education Diploma, and she is working on a BEd Honours in School Management. She has 19 years of experience as a teacher, and her mother tongue is Afrikaans. She is responsible for all administrative duties, communication, meetings and the 15 staff members in her department. She teaches Afrikaans (Grade 5 Home Language and Grade 5 First Additional Language) and social science in Afrikaans and English to 115 learners. HoD A described the workload of an HoD:

'There are many duties; we have many administrative duties, and there are many documents to be completed and the progress statements submitted after each term must be submitted. There are many more administrative tasks than in the past, and the fact that a report must be published four times a year places pressure on a person.' (HoD A, date unspecified)

Apart from HoD A's usual tasks, she is also responsible for all the committees at the school. In addition, she is responsible for the tuck shop and the R5 days at the school. The language policy of the school is parallel-medium – Afrikaans and English. HoD A regards her school as an effective:

'Absolutely no distinction is made between the Afrikaans and the English learners. Our policy is in place, our administrative tasks are right, we attend meetings and four of the HoDs, as well as our head and deputy head, have attended the Advanced Certificate course in Education Management.' (HoD A, date unspecified)

HoD A sees herself as a people-orientated leader who focuses on the staff's needs. She said: 'I take people's situations into consideration, and people like to come and talk to me about their personal matters' (HoD A, date unspecified). However, she also sees herself as a teaching leader:

'I am aware of everything. I attend all meetings that ensure the curriculum information is correctly communicated to the teachers, they have the necessary documentation always on time. We hold regular meetings. We have a specific planning according to which we work – each specific component gets its specific time.' (HoD A, date unspecified)

The language policy of the school has an influence on her workload:

'Definitely, yes, definitely because we have to plan double for all the subjects, even if it's not just specifically in languages, if we have social science or natural science and whether we have languages, it should all planned double in both languages.

The tests are set twice – even our circulars. Everything must be done twice. Assessments are done in Afrikaans and English, meetings in Afrikaans and English.’ (HoD A, date unspecified)

HoD A cites the example of a teacher who offers four learning areas in both languages – it means they must plan eight times because everything is explained in both languages. In answer to the question of whether the workload at a single-medium school differs from a parallel-medium school, she replied:

‘I would definitely say so because, as I said earlier, the book marking, the meetings, everything has to be done in both languages. Meetings are usually held in Afrikaans because all the staff is Afrikaans first language speakers. Only when students attend meetings they are held in both languages.’ (HoD A, date unspecified)

HoD A sometimes skips to another language if she cannot remember a term: ‘I ask the learners: “*Komers, komers, komers?*” Then they will help me and reply: “Blanket, Teacher”’ (HoD A, date unspecified). When terminology is above the learners’ ability to understand, she uses educational media to develop concepts and explain idioms. HoD A’s last words in the interview regarding the change of language policy and workload summarise the impact of dual-medium schools: ‘It really has a huge impact on all levels, as you have to do everything in both languages; so all your work is doubled then.’ (HoD A, date unspecified)

■ Focus C: Document analysis

The following documents formed part of this analysis:

- Worksheets: Grade 5 social science.
- Agendas of meetings: inter-phase meetings.
- Textbooks: Afrikaans Home Language and Afrikaans First Additional Language.
- Relevant legal framework and court cases (as discussed in the literature review).

The most important outcome of the document analysis is that the documents are available in both languages. There were no translation errors in the worksheets and textbooks. The language skills of the teachers in both languages were very good. However, the minutes of meetings were available in only one language. The reason for that was that all the personnel at the school were fluent in Afrikaans, and it was not required to hold meetings in both languages. This may become an issue because of misinformation and communication gaps.

■ Focus A: Observation in class

HoD B’s class was well-organised. There were relevant posters in both Afrikaans and English in his class. His verbal communication was positive, and he constantly moved around amongst the learners in his class. His language skills in Afrikaans

and English were very good. He maintained very good discipline in his class. The learners used classroom dictionaries to switch between the two languages of instruction. HoD B sometimes used Afrikaans in class for the English groups of learners who took Mathematics in English, for example, '*Koop dit as jy dit nie het nie; hoeveel het jy? Dankie, Kayla*'. Learners who answered questions correctly received positive feedback from HoD B, and the other learners clapped their hands. Textbooks were available in both languages of instruction. HoD B spoke of a 'nominee' instead of a 'numerator' when he explained common fractions. However, HoD B's class enjoyed his lessons a great deal, and there was a positive learning environment and learning climate. HoD B was not interrupted during class time, and he did not have a phone in his class.

■ Focus B: Individual interview

DP B has a 4-year diploma that is appropriate for primary school, and he has also pursued further studies. He has 21 years of teaching experience. In response to the question, what does your job involve?, he replied:

'My tasks at the school or some of the tasks I have at school involve several responsibilities. We are three HoD at the Intersen phase (Intermediate and senior phase) phase, and each has been appointed to oversee several matters and what his baby is. For the most part, I am with the safety of the school, the safety of the child, the health of the child concerned; I was appointed as the security person at the school'. (DP B, male, date unspecified)

HoD B is responsible for ten staff members at his school. He offers Mathematics for Grade 6 in Afrikaans and English, and he also imparts life orientation for Grade 7. There are approximately 1 100 learners in the school, and he teaches 170 learners. 'I reckon an HoD's duties and responsibilities have these days become much more.' This was HoD B's answer about his work as HoD. The school's language policy is parallel-medium with Afrikaans and English as the LoLT. There is talk that there will be another LoLT implemented. He regards his school to be effective, especially in the academic area. Parents transport their children from far to school and there are 'No negative things' and 'parents only have something good to say about the teachers and the school'.

DP B experiences the leadership style at his school as positive 'because there are boundaries for you but if you want to cross the boundaries and you have discussed it with the person involved, there is no crisis'. HoD B considers his own leadership style as 'comfortable'. He sees himself as a leader who empowers his staff. 'I am by no means an autocrat'. He considers himself an HoD who is a developing teaching leader. Regarding the language of instruction in his department, he says:

'Great positive, yes – where I come from a school that was predominantly Afrikaans, and now suddenly it's Afrikaans and English, so yes, it's very important for me to make sure the person sitting in my meeting understand me.' (HoD B, male, date unspecified)

HoD B takes responsibility for the curriculum in his department. He says that he always wants to be one step ahead of the other. However, he listens to input from the staff. According to HoD B, the language policy has an influence on the workload of the HoD at parallel-medium primary schools:

'For sure, yes, because when I was appointed I came from an Afrikaans school; now suddenly I am in an Afrikaans- and English-speaking school, so yes, I had to learn to attend meetings and to lead meetings in English and to present classes in English and some of the keywords in the learning area is not always easy.' (HoD B, male, date unspecified)

He also says that he is not yet completely bilingual but that he learns every day. According to HoD B, most learners' home language is Sotho or Zulu. Interviews with parents take place mostly in Afrikaans and English, but interpreters are also used if the parents are not proficient in one of the two languages. He also says that his school promotes multilingualism. HoD B will, during class, mix his language to make sure the learners understand.

DP B said the following about his workload:

'If you move from a single to a parallel-medium you have double the work now - so in the beginning when I moved here, in my first year, I sat until midnight [or] half-past one to get my documents in order.' (DP B, male, date unspecified)

He does his planning only in Afrikaans, but meetings are held in English. Communication with the parents is imparted only in English. All policy documents must be translated from English to Afrikaans. He says that it is, therefore, double the work in the beginning. The job description of HoD B reads: 'he is the HoD for educational guidance and the grade head'. These include safety, social care, health, and progress of the learners. He is also part of the school-based support team. The learning areas he teaches are Mathematics and life orientation, and he is also the learning area head of life orientation and arts and culture. He coaches athletics and is a cricket organiser as well as a cricket coach. In addition, he is in charge of the leaders, scholar patrol, leadership camps and educational tours. Furthermore, he is a member of the governing body.

■ Focus C: Document analysis

- Assessment plans for Mathematics.
- Lesson plan common fractions.
- Minutes of governing body meeting.
- Adventure camp letter to parents (Grade 4).
- Newsletters 5 and 28 (permission letter and general information).
- Minutes of phase meeting.
- Relevant legal framework and court cases (as thoroughly discussed in the literature study).

Assessment plans, lesson plans and adventure camp letters were available in both Afrikaans and English. The minutes of the governing body meeting were mixed (Afrikaans and English alternately). Newsletters 5 and 28 were only available in English. The phase meeting was only available in Afrikaans. The planning, assessment, textbooks and worksheets were available in English and Afrikaans. Communication with parents was done in English only. At certain meetings, the language is mixed, while meetings where the staff is involved only take place in Afrikaans. The situation determines which language or languages are used.

■ Focus A: Observation in class

The observation of HoD C took place during a learning opportunity in life orientation for Afrikaans and then an English-speaking group in Grade 7. The class was professionally decorated with life orientation posters. Good discipline was maintained. A movie about conflict was shown. The HoD's proficiency in both languages is excellent. He does not struggle with appropriate terminology and speaks both languages with the correct pronunciation. He is bilingual (Afrikaans and English).

■ Focus B: Individual interviews

HoD C has eight years' experience as a teacher. He is the HoD of the Intermediate Phase and the Senior Phase. The learning areas for which he is responsible are Afrikaans, English, Mathematics and natural science. He teaches life orientation in Afrikaans and English for Grade 7 and technology in Afrikaans and English for Grade 6. Furthermore, he takes care of the general control, assessment, planning, moderation of papers, work control of books and scripts and the ordering of textbooks. He is also in charge of school photos and printing at school. He is responsible for 18 staff members in his department. The number of learners he teaches is 310. Regarding his workload, HoD C says: 'At the beginning of the year, it is quite a lot of organising because it is printing and manuals that come in, it is the distribution of books'. On the influence of language policy on his workload, he responds:

'Yes, definitely, if there is more work to be done then you will do the things in two languages - where you only did planning in Afrikaans, you are going to have to do in English again - such as this assessment plans that we have, which we have to duplicate in Afrikaans and English - it takes a while - it is duplication.' (HoD C, male, date unspecified)

At the end of the interview, he responds about the workload of a HoD:

'I think it's more, it's definitely more - the English children, the reporting of the English-speaking learners are in English, the codes need to be translated; the translation takes quite a while.' (HoD C, male, date unspecified)

There are 1 100 learners in the school. The school is a parallel-medium primary school. Communication with the parents takes place in Afrikaans and English, and the annual general meeting is in Afrikaans and English. He regards the school as an effective school; 'the timetable is in full swing – the learners are always actively engaged – there are no periods that are wasted on nonsense'. The leadership style of the management team is democratic, even though it sometimes takes longer to make a decision. HoD C sees himself as a teaching leader in the making. There were issues between the governing body and the school's principal that disturbed the school's focus.

The mother tongue of all staff members is Afrikaans. The language used during these meetings is, therefore, Afrikaans. HoD C moderates the papers in both languages and makes sure that there are no spelling mistakes. The school's language policy implies that everything is to be done in duplicate. All the staff is not as fluent in both Afrikaans and English as HoD C. The home languages of the learners who speak English are Pedi and Sotho, and the Afrikaans learners speak Afrikaans. Communication to the parents takes place in English. The principal holds meetings in English and Afrikaans.

■ Focus C: Document analysis

- DA 3-1 Assessment plan (Technology: Afrikaans and English – Grade 6).
- DA 3-2 Assessment Task 1 (Technology: Afrikaans and English – Grade 6).
- DA 3-3 Worksheet (Technology: Afrikaans and English – Grade 6).

All the planning, assessment and worksheets are available in both LoLTs. The content is the same. The translation was also very well done. HoD C is very well-versed in both the languages – Afrikaans and English. The translation implies that the workload in respect of the above is much more than that of an HoD at a single-medium school.

■ Conclusion

The most important finding of this research is the influence of language policy on the teaching leadership of the HoD in parallel-medium primary schools. The workload of HoDs at parallel-medium schools differs from that of their colleagues at single-medium schools. Although the duty statement is the same, HoDs at parallel-medium schools do all their work in two languages. It includes their work in the classroom as well as their tasks as teaching leaders. The planning of each learning opportunity must be done in both languages. The marking and assessment of essays and papers is done twice. Furthermore, their meetings with staff and communication with parents are also conducted in two languages. Even at an extramural level, communication must happen in both languages. The language policy at these schools influenced and changed the workload of these three teaching leaders.

Subsequently, the language policy also influenced the specific management and leadership challenges. The HoDs at these parallel-medium schools had a challenge at each level of leadership and management that is different from that of single-medium schools. Firstly, they must have excellent language skills in both LoLTs. All three participants are learning area heads, and therefore they must also be experts in the relevant learning areas. This implies that the HoDs must have mastered relevant concepts in both languages. The three participants are experts in their learning areas and perform their roles as curriculum leaders professionally.

Lastly, the three HoDs had limited knowledge of the legal framework and case law. From the observation, I could construe that language rights are protected and that the three participants work well within the framework of the Constitution and the *South African Schools Act*. Learners are not emotionally bullied or degraded, and effective teaching and learning happened during the observations. The participants knew what their duties were on their duty statement, but they did not know about the PAM. The human rights of learners and teachers in general and language rights specifically are not infringed on.

Enablers of HoD curriculum leadership: Views from HoDs, principals and departmental officials

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■ Abstract

Research conducted by many academics shows that on the one hand, there are a number of barriers that HoDs in secondary schools encounter in their daily work. On the other hand, there are enablers that HoDs encounter in their tenure as curriculum leaders as well. This research aimed to answer the research question regarding what the enablers of HoD curriculum leadership were. This was in contrast to always searching for inhibitors but not looking at what actually aids HoDs in carrying out their work with ease. A qualitative, phenomenological approach within an interpretative paradigm was employed, and a purposive sampling technique was used. Twelve HoDs and six principals from rural and urban schools in the quintiles one to three (Q1-3) and quintiles four to five (Q4-5) categories and two departmental officials from two subdistricts were sampled. Data were collected using semi-structured,

How to cite: Tapala, TT 2022, 'Enablers of HoD curriculum leadership: Views from HoDs, principals and departmental officials', in L van Jaarsveld, CC Wolhuter & CP van der Vyver (eds.), *Education Leadership: Scoping, perspectives and future trajectory*, AOSIS Books, Cape Town, pp. 183-196. <https://doi.org/10.4102/aosis.2022.BK383.10>

open-ended questions. The literature review and the empirical research revealed that there were a number of enablers in schools that could be used and fortified to make the incumbency of HoDs much easier and profitable to all involved.

■ Introduction

In their research, Tapala (2019) and Tapala, Van Niekerk and Mentz (2021) reveal that the HoD is a member of the school management team (SMT) with the co-primary task of curriculum leadership. Furthermore, they are accountable for effective teaching and learning activities in their schools (Ogina 2017). Gurr and Drysdale (2012) postulate that theirs is a hermaphroditic responsibility because they carry out the tasks of curriculum leader and, at the same time, are expected to be a full-time teacher, teaching a subject. The HoDs are referred to as middle leaders and fall within a group of other leaders in the category. As Tapala (2019) and Tapala, Fuller and Mentz (2021) put it, amongst these groups are department chairs, administrators, curriculum coordinators, subject coordinators, subject leaders and a host of others not mentioned here (Jaca 2013). The title of middle leadership is suitable for HoDs, as they literally lead from the middle. Furthermore, Tapala (2019), in unison with Grootenboer, Edwards-Groves and Rönnerman (2015), avow that the position of HoD is situated below the principal and is part of the SMT. The HoDs are part of a team of people who are crucial in the leadership and management of the curriculum in schools. The *Employment of Teachers Act* (76/1998) recognises the HoD as a formal position that is part of the SMT (Ghavifekr & Ibrahim 2014), setting out the conditions of remuneration, roles and areas of responsibility of the HoD. It is clear that the HoDs are middle managers of schools. This research uses the commonly used concept of HoD to describe them.

To be an HoD brings with it many challenges. On the one hand, there are 'enablers' that enhance one's work, while on the other hand there are 'obstructions' that can impede or prevent one from executing such work (De Angelis 2013; Tapala 2019). However, the latter are not the topic of this chapter and the discussions that ensue here address enablers of HoDs as curriculum leaders.

■ Literature review

■ What enables the HoDs as curriculum leaders?

The literature review reveals numerous enablers that can enhance the HoDs' performance. These enhancers include the culture of the school, leadership support, staff support, training and professional development and cooperation, as identified by Tapala (2019:94), and are deliberated on further.

□ School culture

Many enablers to the HoD leadership are cited by various researchers and academics, including Leithwood (2016), Ogina (2017), Seobi and Wood (2016) and Simkins (2012), and recently in studies by Tapala (2019:95). Companionship and cooperation amongst coworkers and a school-wide culture that reaches through all domains and echelons of the school are such enhancers (Tapala 2019). A school culture that is focused on teaching and learning should be observed and followed by stakeholders. The culture should provide platforms for learner grievances (Leithwood 2016). As Leithwood (2016) puts it, learners should also have entrance to opportunities that can assist them in gaining competencies made accessible and stimulated. This research attests that intertwined in the school culture should be evaluation for quality assurance, provisioning of information and guidance, and class observations carried out by the SMT members as prescribed by the Education Labour Relations Council (ELRC 2003). Furthermore, this research perceives that well-rewarded employees like HoDs will do more as they feel wanted and recognised. The school culture should consider that the reward must vary according to the quantity of work done and the size and resourcefulness of the school. However, for HoDs to succeed, the school leadership must offer them ample support.

□ Leadership support

Support from the SMT plays a critical role as an enabler for HoDs to execute their responsibilities (Pinkelman et al. 2015). The literature review reveals that the SMT play a pivotal part in supporting the HoDs (McIntosh et al. 2014). McIntosh et al. and Pinkelman et al. further note that supportive a SMT validates their active involvement in the school's activities, displays a noticeable leadership style and facilitates the process of supporting other leaders. Principals are specifically immersed in providing comprehensive support for all educators in the school (McIntosh et al. 2014). Well-intended mentorship and interpersonal skills of school leaders, as well as dependable articulation of continuous backing, are essential to the upskilling of the HoD. Regular support enables HoDs to overcome challenging encounters at work. Support can be from all angles, including from staff members.

□ Staff support

As much as school leadership and management provide the necessary support, support from staff members also enhances the HoD's output (Sanford DeRousie & Bierman 2012). Teachers within and without the HoDs department should provide support to the HoD to validate their pledge to the standards set out for their department and the entire school. The members should be eager to be followers and partake in pronouncements of the department

(Sanford DeRousie & Bierman 2012). Heads of departments' work is enabled when they receive the necessary backing required from everybody involved in the educational activities of the school. Teamwork by members of the staff, especially by the members' own departments, makes the HoD feel appreciated. Although support is integral for HoDs to perform their work, the requirement for training and development cannot be overstated.

□ Training and professional development

Pinkelman et al. (2015) postulate that performance of work and attainment of goals are mostly reliant on the levels of preparation workers have received. It is the value, recense and constancy of the development, together with the support provided to the workforce, that permit employees to achieve better than development opportunities are not provided. Continuous development boosts the employee work output (McIntosh et al. 2014). When HoDs' are exposed to prior training for the incumbent position of leadership, they have a better chance of success compared to those who have received no training at all. Another enabler for the HoD is teamwork.

□ Teamwork

Well-established and functional teams are safe havens for employees. This is because members always meet and know one another. They also recognise how each team player functions. Heads of department belong to teams such as their own departments and SMTs. Heads of departments' work is enhanced when the teams they belong to understand them, how they do things and how they think (McIntosh et al. 2013). As Pinkelman et al. (2015) contend, constant, well-organised meetings enable leaders such as HoDs to perform optimally while sharing their ideals and desires with the team members (Tapala 2019). In belonging to a team, members expose themselves to how decisions are made and how the decisions will be implemented.

■ Methodology

A qualitative design was employed for this research because of its interactive nature. In-depth semi-structured interviews were used (cf. Merriam 1998; Merriam & Tisdell 2016), as the researcher interviewed and interacted with all participants at their workplace about their real-life experiences. Text materials were collected systematically, organised and interpreted from conversations and observation. The meaning of the researched social phenomena from the participants' viewpoints was explored (Merriam & Tisdell 2016).

A phenomenological inquiry mode was employed as it assisted in understanding the lived experiences of HoDs, principals and educational officials on the enablers HoDs experienced as curriculum leaders (Merriam &

Tisdell 2016), while the researcher explored and described the phenomenon (Merriam & Tisdell 2016; Thomas 2017) to describe the enablers of HoD leadership in secondary schools (O'Reilly & Kiyimba 2015).

Purposive sampling was preferred for this research. It was employed because all the participants had in-depth knowledge of the phenomenon under research (Moser & Korstjens 2018). Simply put, it is a deliberate sampling technique (Etikan, Musa & Alkassim 2016). This technique was used for the following reasons: firstly, because of ease of accessibility, as it was with HoDs and principals in schools and departmental officials in the subdistrict in the local offices; secondly, because of their location where it is easy to travel; thirdly, because of the availability of participants when needed, especially during times when appointments were agreed upon; and fourthly, because of the eagerness of the participants (cf. Tapala 2019).

Rural and urban schools were selected on an equal basis, three each. Schools in the quintile range one to three (Q1-3) to quintiles four to five (Q4-5) were considered. On the one side, Q1-3 schools mostly have low-income families and are mostly found in rural areas. These schools are Section 21 schools, meaning they are no-fee schools and parents are not required to pay school fees, as they are fully subsidised by the provincial education departments. The SGBs are capacitated to manage their own financial affairs (South Africa 1996). On the one hand, Q4-5 schools are schools found in economically affluent communities with better levels of disposable salaries and where parents are generally employed. Many of these schools are found in urban areas. Schools in the Q4-5 category are also Section 21 schools, but the difference is that because of the social status of the parents, they are required to pay school fees. These schools also receive a subsidy from provincial education departments, but much less compared to Q1-3 schools. The SGBs also manage their own financial affairs.

Twelve HoDs (six from each category of schools and two from each of the schools), six principals (from each category of schools) and two departmental officials (one from each subdistrict) were selected as participants.

Heads of department with a minimum of three years' experience were selected for being permanently employed at the participating schools. Principals were automatically incorporated in the study for their knowledge of the researched phenomenon and because they could give a fair view of the enablers the HoDs experienced as curriculum leaders. The last category of participants was educational officials. They were chosen because of their direct involvement in providing training and assistance to SMTs, chiefly HoDs. The officials possess ample knowledge of the latest trends in curriculum leadership. Their knowledge and understanding of education matters could assist in answering the research question on what the enablers to HoDs' curriculum leadership were.

■ Results and discussion

The study endeavoured to answer the research question on what enablers were experienced by HoDs to enhance their curriculum leadership. Enablers are circumstances that assist employees such as HoDs in carrying out their authorised duties without difficulty (Sancha, Longoni & Giménez 2015). The following are common enablers experienced by most of the HoD respondents:

- receiving support
- having open communication channels
- good planning
- prospects of development
- the existence of affirming culture
- good pupil discipline.

A discussion of the enablers experienced by HoDs is provided further in the text.

■ Support

Support is the first enabler mentioned during the interviews. No one can argue that support is an enabler that enhances the work output of both leaders and subordinates. Backing by the SMT, mainly from principals, has an important bearing on HoDs by helping them with difficulties and hindrances in various departments at school. Principals reassure HoDs, and in response HoDs improve their work output (Pinkelman et al. 2015). In their research, McIntosh et al. (2014) highlight backing HoDs for better instructional supervision and learner performance as crucial. This was also mentioned by most of the participating HoDs when responding. The HoDs retorted:

‘The support from the principal [...] I’ve got the support from him.’ (Sch1, HoD2)

‘So if I have challenges, I go to them, and they provide me with any assistance of any kind.’ (Sch4, HoD8)

‘During SMT meetings, we talk about the things that we are going to do and even the challenges that we experience in our different departments. And the good practices we share with each other.’ (Sch3, HoD5)

‘Support from the SMT is there.’ (Sch2, HoD4)

Moreover, almost all of the school principals mentioned support as an enabler in their responses. They also mentioned support for the HoD from different external stakeholders. Many of the principals declared that they understood and helped with HoDs’ challenges, mainly regarding learners’ poor discipline. Other principals said that they supported their HoDs on issues with teachers, especially those that did not complete submissions timeously. The principals also alluded to the fact that external support was

given to HoDs in the form of professional support forums. The following responses were given:

‘We had such a problem in our department [...] a challenge of a particular class and it was reported by an HoD [...] the whole management, and we go and talked to the whole class the whole day, showing them what we like about them and what we don’t like about them [...] the whole SMT will be assisting the HoDs in order to make sure that doing their work [*sic*] it becomes easier.’ (Sch1, Pr1)

‘The support that we give them is when teachers are resisting [...] you intervene as a principal [...] they do get help from the [*professional support forums*] because they do call the teacher and the HoD [...] somewhere, somehow they do get some help or support.’ (Sch2, P2)

‘Yes, I give them support.’ (Sch4, Pr4)

Educational Official A (OA) cited support in his answers but was not explicit in mentioning what was done in terms of the support given to HoDs. The official also stated that while the HoDs expected to be supported, they should, in turn, support others:

‘For example, it is the duty of the head of the department to support his teachers, so that the performance could be realised. At the same time, it is expected that the deputy principal is the head of the curriculum in the school; he is supposed to be supporting the heads of the departments. Same applies to the principals. But you will find that somewhere along the way, this line of arrangement that is expected is not realised due to a number of reasons.’ (SDA, OA, date unspecified)

Support enables HoDs to execute their work with ease, knowing that they have backup and a shoulder to cry on during times when they experience professional or personal challenges (Tapala 2019). Open communication channels were also mentioned as an enabler experienced by HoDs.

■ Open communication

The second enabler mentioned by respondents was open communication. Communication is a day-to-day manifestation and is mutual. Heads of department are expected to communicate with their teams and those they come into contact with (Ghavifekr & Ibrahim 2014). They should share information with both their coworkers and the SMT on learner performance and on issues with teachers. Sound communication by HoDs is realised by their being actively involved and establishing solid networks with stakeholders, both internally and externally (Wiles 2009), creating understanding and discussing the planning of the department and the school. As stated by Wiles and Bondi (2007) and Wang and Shen (2017), communication creates channels for group and departmental activities, enhances positive and effective collaboration, assists in the management of time, resources, conflict resolution and collective decision-making and creates harmony amongst stakeholders.

The HoDs revealed that communication helped them to share information and created prospects to listen to one another. This can be during morning briefings, where the expectations of the day are discussed. They said that in their schools, they also had discussions before parents' meetings and on learner absenteeism, amongst other things. Forms of communication mentioned were internal memos, information books and external circulars. The following was said:

'Our communication flows [...] We have a meeting almost every week, but some are not formal meetings [...] for instance, if we have circulars that we need to discuss [...] SMT meetings, it is where we announce it all [...] We speak about the progress of the school [...] problems [...] changes [...] first discuss at the SMT.' (Sch4, HoD8)

'We call it "departmental meetings" [...] let them talk and discuss and suggest [...] criticise you, criticise constructively [...] discussing [...] each subject.' (S6, HoD11)

'I call them "circulars", and I number them like, Circular 1, if it's the first circular of the year, I call it Circular 01/18, and so on and so on.' (Sch3, HoD6)

'I normally hold the meetings with my teachers addressing several aspects in connection with the subject delivery [...] to ensure that the content is covered as per the dictate of the annual teaching plan.' (Sch2, HoD3)

'I also have an information book that I use to communicate with educators [...] the information book to remind them too about the submission [...] the morning briefing [...] and even the school WhatsApp.' (Sch3, HoD5)

The majority of the principals mentioned that communication was an enabler for HoDs. They declared that they held meetings with their SMT, of which the HoDs are part, to discuss academic matters. The principals made the following remarks:

'SMT meetings, we have a standing item where the HoDs, they give reports [...] either academic or any challenge that they have; it can be learners in those departments and how they try to sort them out, and from there, we draft a plan [for] the way forward.' (Sch1, Pr1)

'I think we communicate with HoDs during meetings [...] We all communicate during meetings.' (Sch4, Pr4).

'But also having the morning briefings, staff meetings, SMT meetings, I think assist the HoDs in doing their work.' (Sch6, Pr6)

The educational officials revealed that meetings for communication purposes also took place with other stakeholders, inclusive of the SGB, parents and learners:

'School governing body together with the SMT, the principal, the HoD and the deputy principal – they call a meeting [...] it bridges the gap because the two of them from the school's side, and from the home's side, they are able to discuss learners and, you know, all those challenges that they come across.' (SDA, OA)

'I will just maybe call one or two [HoDs] [...] from a particular school and he addresses the principals [...] what you need to expect from the HoDs [...] share your good practices.' (SDB, OB)

Communication happens on various levels in the school leadership, taking many forms, and various channels are used to implement it (Tapala 2019). Open communication assists in providing a free flow of information, preventing information bottlenecks as information reaches the intended audiences on time. Planning was another enabler for HoDs.

■ Planning

Planning was the third enabler revealed by the participants. Heads of department are responsible for planning for their departments and for the school (De Nobile 2018). It encompasses the formulation of a curricular vision, setting goals and influencing teachers towards the said vision (Thorpe & Bennet-Powell 2014). Heads of department must come up with realisable thoughts for their teams for learner performance (De Nobile 2018). They plan the subject, grade-level, phase-level and whole-school curriculum (Tapala 2019). They plan for teacher placement and the number of assessment activities that should be given to learners per subject, grade and phase. The plans must be shared with their fellow teachers to work towards said plans (Fleming & Amesbury 2012). The annual teaching plan and monitoring plans are some of the plans the HoDs mentioned for successful curriculum implementation:

'I monitor lesson preparations, is number one. Teachers are teaching according to the annual teaching plan. Sometimes they work according to a work schedule and teachers.' (Sch6, HoD11)

'I have my own plans, but those plans, they are directed to them to give them instruction to submit this on this date, like that, yeah.' (Sch1, HoD2)

'My plans help me a lot to get information from various teachers in the department. Besides the plans, I wouldn't get anything. That is the first thing that helps me to do my job very easily.' (Sch2, HoD3)

'We plan a lot of things together, like fundraising, yeah, we are together to see the school at the next level, yes.' (Sch4, HoD7)

The principals also highlighted the importance of planning as an enabler for HoDs in monitoring educators' work. They had the following to say about the use of plans for monitoring:

'The HoDs also, they have their own activity plans of which [*sic*] they also pass them to my office [...] I have them in my office. They do that, and honestly, they follow them.' (Sch1, P1)

'They use it during their lesson presentation teaching in order to cover this curriculum coverage.' (Sch4, Pr4)

One of the educational officials gave the following response:

'That HoD will be having some kind of a guidance in the form of policies, and an example of such policies could be, if I can give an example, could be the annual teaching plan. The role of the HoD in that instance is to ensure that the prescribed

annual teaching plan at the school level is implemented according to the dates given, its assessment is done accordingly as expected, as planned and like [...] if your planning is done accordingly, then you are able to survive.' (SDA, OA)

Institutions such as schools and subject departments need strategic and operational planning to perform well and assist in executing their aims and vision. On-the-job training and development were also mentioned as an enabler for HoDs.

■ Training and development opportunities

Training and development opportunities were mentioned as an enabler by the participants. How people execute their duties mainly depends on the level and frequency of training they receive (Pinkelman et al. 2015). In-service training contributes to enhanced performance compared to when they would if it were not provided. As McIntosh et al. (2014) declare, training and constant development sustain the performance of employees. The HoDs mentioned that they received training and development where leadership, expectations and responsibilities, how to analyse results, filing and conducting meetings and workshops were inculcated.

The HoDs received training in the form of induction, professional support forums and workshops from the principal-initiated development of the National Education Collaboration Trust. Although training was provided, the HoDs mentioned that the training was not enough. The training mentioned by the HoDs included how to carry oneself as an HoD, analysing results, how to conduct meetings, managing workshops and inducting new staff:

'The benefit is you learnt some of the things maybe that you are not aware of.' (Sch1, HoD1)

'I'm trying to figure out and I'm trying to remember, yeah, we were given training when we were inducted. Yeah, when we were inducted, I remember now. The induction of HoDs, yeah, we were taught about the conduct and everything relating to leadership.' (Sch2, HoD4)

'We plan a lot of things together, like fundraising, yeah, we are together to see the school at the next level, yes.' (Sch4, HoD7)

'We plan together in terms of the monitoring plan and the moderation plan that is done internally; we plan together, yes.' (Sch6, HoD11)

Principals also provide training for HoDs. The principals indicated that they had conducted workshops with their HoDs on curriculum tracking, leadership, and management. The following was said:

'At this time, we had a workshop, and I was workshopping them. Some few days ago, we got sort of a template [on] how to track curriculum. So that template is just a spreadsheet, a very nice spreadsheet, where when you enter the topics, you enter, like, you agree how many activities are they going to give for this term.' (Sch1, Pr1)

‘Yes. This is what we do normally. Every year we have the “Bosberaad,” and in the “Bosberaad” we’ve got programmes. And in one such programme, we have the principal, you know, capacitating educators on leadership and management. And that is the responsibility that is always given to the principal.’ (Sch5, Pr5)

With a bit of scepticism, one principal acknowledged that some form of training was given to HoDs, but the participant worried about the length of time given to such training and development opportunities:

‘Although to me it’s minimal, yeah, it’s minimal because it’s from two o’clock up to four o’clock. For somebody who, say, is not familiar with the subject, say Mathematics or mathematical subjects, it won’t do so much.’ (Sch2, Pr2)

Another principal mentioned that some curriculum leadership training provided to HoDs was received from external service providers, such as the National Education Collaboration Trust:

‘I think they have the knowledge because sometimes, as previously, as I have told you, they went for the induction in connection of the curriculum; we also went for the other national education training, NECT [*National Education Collaboration Trust*] last week, and they are supporting the curriculum. They are curriculum-based.’ (Sch5, Pr5)

An educational official declared that they provided training for their HoDs at the beginning of the year on matters relating to curriculum management. The other official gave a sobering analysis of why the training and development of HoDs were of such importance:

‘I am going to give an example in terms of my subject that, like I have indicated in the beginning of every year, I train my HoD on the curriculum management on what is expected of you as the curriculum leader. What is it that you need to have and the like?’ (SDA, OA, date unspecified)

‘You know, training my teachers for me, which is a very important thing, training my teachers how to teach. Curriculum leadership will never be curriculum leadership until it involves the understanding that I will teach teachers how to teach. Sometimes you will think that they know, but sometimes you have to teach them.’ (SDB, OB, date unspecified)

The benefits of training are huge, as alluded to in this study, but minimal provisioning thereof may limit the performance of an employee. The participants also mentioned positive school culture as an enabler.

■ Positive school culture

Culture is key to any organisation. Positive school culture is another enabler experienced by HoDs. Schools with a positive school culture focus on teaching and learning (Leithwood 2016). A positive culture limits hindrances and enhances support from colleagues. Moreover, a positive school culture makes HoDs feel at ease while doing their work. Half of the HoDs mentioned aspects such as unity in working together, feeling like family amongst colleagues, teamwork and being part of a group, help from other HoDs and deputies, a

peaceful school environment, deciding and acting together, harmony and socialising at year-end functions. The HoDs felt that the culture at their schools was conducive to teaching and learning, that it was positive and welcoming. Furthermore, they mentioned that they had an enabling school culture where teaching and learning took place with little disruption and harmonious relationships:

'But what is nice is that a working relationship is there, and teamwork is there, starting from the SMT. Now we work together and when the principal is not there, one of us act as a principal to experience that. Talk to the teachers and all that. There's peace in the school. It's only that we are here about learning. Learners are disrespecting. We are acting together in supporting each other so that that teacher cannot feel left on her own. Yes, the harmony of the school is good.' (Sch6, HoD11)

'Yeah, we have each other, most of the time myself and other HoDs and the deputies, we are working on the same page.' (Sch5, HoD9)

'The culture is good [...] What I've realised in our school, I've never seen, I'm not saying we are perfect, but I've never seen, you see, there's no group A, group B teachers [...] the environment, it is good.' (Sch4, HoD8)

'The school culture is supportive although we have a miss [*sic*] one day. But one day is better, but if I can judge it, it is normal. Teachers are supportive; we have teamwork, and problems like absenteeism and conflicts, they are not there.' (SchS3, HoD5)

'It's very, very welcoming, and the staff here is like a family. We work together as one, and they work jointly in achieving a goal; hence, the level of discipline here is good; so there are elements that need attention. Not all learners are bad. Now that is because of [*the*] educators here are working together as one team.' (Sch2, HoD3)

The principals mentioned that a positive culture prevailed at their schools. Although that is a fact, one principal appropriately mentioned that the culture of a school would never be 100% positive, but at least their educators knew that they had to support the HoDs. The principals also mentioned that it did not mean that if educators forgot to submit tasks, it meant that they were negative. The following responses were given:

'Again, it's something that we can't say is 100%. We're okay as a school because it's also there in all institutions [...] the teachers, they know what they are supposed to do, and the learners also, they know what they are supposed to do; so it becomes easier for HoDs.' (Sch1, Pr1)

'An enabler [...] It's [*with some hesitation*], I think it's just that they forget something like that, they not really mean that they don't cooperate.' (Sch4, Pr4)

One official agreed that culture could make or break a school and affect the performance of the HoD. The official also mentioned that the school culture mirrored the leadership of the school of which the HoD was part. He said:

'Okay, each and every school has got a culture, I must say, and when you visit an institution or when you join the institution, there is a saying which says, "do what the Romans do." And culture of the school is the face of the kind of leadership that exists [...] [*The HoD*] is part of it [*school culture*]. So those are the [*stammering*

a bit], you know, key levels that you look at to say when you define the culture of the school; if the school's culture is known for high performance, even the motto is high performance, it means they comply to what the culture of the schools says and is like. At times, leadership is not up to scratch, maybe the principal, the deputy principal; that automatically affects the HoD.' (SDA, OA, date unspecified)

A positive school culture encourages members of a team or organisation such as a school to perform at their peak, as they are encouraged to do so and feel at home (Tapala 2019). The culture also encourages the members to be innovative and limits low staff morale, absenteeism and high staff turnover. Furthermore, the participants pointed out that schools needed learners who were well-disciplined.

■ Positive learner discipline

The sixth enabler is positive learner discipline. Indiscipline causes chaos and poor performance in learners (Belle 2018). Belle also mentions the fact that a lack of discipline may cause serious barriers in managing teaching and learning. If controlled well, learner discipline can give schools room to perform and progress towards desired goals. Where good discipline reigns, the environment is free from disruptive behaviour (Mestry & Khumalo 2012; Tapala 2019) and assists employees such as HoDs in doing their work without any hindrance. The HoDs mentioned that the learners at their schools were generally well-behaved and eager to learn, enabling them to do their work with ease:

'Our learners are well-disciplined learners most of the time.' (Sch6, HoD11, date unspecified)

'The level of discipline here is good; so there are elements that need attention. Not all learners are bad now; that is because educators here are working together as one team.' (Sch2, HoD3, date unspecified)

Only one principal mentioned that HoDs were responsible for good behaviour in the classrooms:

'Yeah, enablers, I would actually say the most important thing for HoDs is to instil discipline and respect in the learners and to make the learners aware of the importance of why they are at school, aware of what is expected of them by the school. So once HoDs make learners aware of such, it becomes very easy for them to carry on with their duties at school.' (Sch5, Pr5, date unspecified)

One official also mentioned the importance of discipline amongst learners:

'Yes, discipline of learners in a school, it is part of the aspect that is being supported by what is called "learner code of conduct" supported by teacher code of conduct. That is being drawn from the *South African Educators Act*, at which [*sic*] it guides what is expected regarding the discipline of learners at a school level. Now the HoD has undergone the process of being a teacher, knows all the conduct of what is expected of them, and it is also important that the HoD should also guide educators on what are the means of discipline regarding learners. As a teacher, because the

HoD is also a teacher, he is familiar and aware and should take the lead in that. I can give an example: new teachers who are new in the system do not know the school practices, the issue of orientation, issues of induction, from classroom level to the outside; that is the responsibility of the HoDs. And that will involve discipline also, of course, on the side of the learners and educators.’ (SDA, OA, date unspecified)

Good and positive learner discipline affords school leaders more time to concentrate on curriculum issues and learners’ performance than on solving misconduct cases.

■ Limitations of the study

Although the study has revealed some interesting facts about what enables HoDs to perform their curriculum leadership roles, it is limited in its scope. A much wider study (countrywide) is required to establish other enablers that HoDs in South Africa may experience.

■ Conclusion

This research aimed to answer the question of what the enablers to HoD curriculum leadership were. The literature review points out training and development, teamwork, support by principals, support by colleagues and positive school culture as enablers. The empirical research revealed, almost in support of the literature review, a number of enablers in schools that can be used and fortified to make the tenure of HoDs much easier and profitable to all involved. These enablers mentioned by the participants are support, open communication, planning, training and development opportunities, positive school culture and positive learner discipline. When reinforced and implemented with intention, the enablers may be a good yardstick for HoD performance in schools.

■ Acknowledgements

This chapter represents a substantial (more than 50%) reworking of T.T. Tapala, 2019, ‘Curriculum leadership training programme for HoDs in secondary schools’, PhD thesis, Education Management, NWU, Potchefstroom Campus, with supervisor Dr M.P. Van Niekerk and co-supervisor P.J. Mentz, viewed 28 May 2022.

The author acknowledges the guidance and assistance of Dr M.P. Van Niekerk and co-supervisor P.J. Mentz, who were his supervisors in writing up the PhD thesis on ‘Curriculum leadership training programme for HoDs in secondary schools’, in Education Management at NWU, Potchefstroom Campus. They gave the blessings for this publication to go ahead without their names.

Part 5

Conclusion

Emerging leading lights for education leadership practice and research

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■ Abstract

This final chapter in the book brings together or synthesises the findings of all chapters, to tease out the implications of what was reported in the chapters of the book, for practice as well as for future research, that is, to find markers for a future trajectory of the field. The teaching of education leadership was used as a reference point in this exercise. What transpired in several chapters was the need for research focusing on the (societal and education system) context and its interrelationship with education leadership, especially in settings in the Global South. The book contains a chapter on teacher leadership, demonstrating that the general defeatism in the education discourse in South Africa is not necessary. The chapters on school leadership highlight the potency of good, innovative, visionary leadership to the attention of school leaders and also for research to showcase cases of exemplary, inspirational leadership. Three chapters surveyed the challenges surrounding the development of mid-level education leadership. To conclude, the authors of the chapters of this book

How to cite: Wolhuter, CC 2022, 'Emerging leading lights for education leadership practice and research', in L van Jaarsveld, CC Wolhuter & CP van der Vyver (eds.), *Education Leadership: Scoping, perspectives and future trajectory*, AOSIS Books, Cape Town, pp. 199–206. <https://doi.org/10.4102/aosis.2022.BK383.11>

have explicated and displayed leadership perspectives on an assortment of critical issues besetting education systems and facing schools and have further drawn attention to some aspects of the scholarly field of education leadership that are critical in advancing the field. The research reported on in each of the chapters not only gives clear indications as to how and where to improve practice, but it also opens a vista for new and future research, critical in the continual advance and relevance of the field.

■ Introduction

The aim of this final chapter in the book is to bring together or synthesise the findings of all chapters and to tease out the implications of what was reported in the chapters of the book for practice as well as for future research, that is, to find markers for a future trajectory of the field. Education leadership is a young but rising field of scholarship. This book showcased a selection of papers demonstrating the value of perspectives on education leadership on a number of critical issues in education (South African education in particular) or teasing out one part of the scholarly field of education leadership. These papers are noteworthy for – though not only for – the entire range of constituencies within both the scholarly field and practice of education leadership, that is, researchers, faculty teaching education leadership at the university level, students at the level of initial teacher education, postgraduate students at Honours level who for the first time embark on a specialised study of the field of education leadership, masters and doctoral students and prospective masters and doctoral students, and scholars of education leadership. The research reported on in the chapters in the volume is also noteworthy for scholars in the field of education leadership to glean current spots of research activity in the field, to identify desiderata in the current research agenda in the field and to find suggestions as to how to take the field forward with future research.

Various disciplines or fields of scholarship each have their distinct features or cultures, as is explained in publications such as C.P. Snow's (1959) highly influential and much cited trailblazing study, *The two cultures and the scientific revolution*, contrasting the two cultures of the humanities or social sciences versus the natural sciences. Becher's (1989) classical study on the disciplinary culture of 12 disciplines has relevance here. Education is a relatively young field of scholarship, still lacking a universal structure for organising knowledge. Whitty and Furlong's (2017) edited volume on education scholarship in seven countries found that the way in which education gets packaged or organised depends more on the contextual exigencies and intellectual traditions in each of these jurisdictions than on any universal or trans-national structural edifice. Education leadership is even younger than education. Education leadership is a field of scholarship still in an amorphous stage, still without a distinct culture. Such a culture, structure, key concepts and threshold concepts, the basic

foundations of a mature field of scholarship, still need to develop in the field of education scholarship. It is from many trailblazing, exploratory studies such as the research contained in the chapters of this book that such foundations will eventually evolve.

■ Need for contextualised research

What transpired in several chapters was the need for research focusing on the (societal and education system) context and its interrelationship with education leadership. What is suggested is especially research situated in the contexts of the Global South. Another topic running through the chapters of the volume is the need to push back the ceaseless undermining of the professional autonomy of education leaders. This has a clear pointer for the improvement of practice, as well as for more research to hammer out how narrow-minded and excessive managerialism is hampering education leaders, as well as research showcasing exemplary case studies of where and how education leaders did succeed in obviating the adverse effects of managerialism.

■ The teaching of education leadership as reference point

In the first chapter, it was explained that this book first surveys the corpus of literature on the teaching of education leadership. The teaching of education leadership was singled out as pivotal for the health, future development and thriving of the scholarly field of education leadership. Therefore, in the second chapter, the corpus of literature on the teaching of education leadership was surveyed. Then, in each of the ensuing chapters, perspectives emanating from each of a team of scholars on education leadership were placed within the panorama of scholarly literature on the teaching of education leadership. These papers are noteworthy for – though not only for – the entire range of constituencies within both the scholarly field and practice of education leadership, that is, researchers, faculty teaching education leadership at university level, students at the level of initial teacher education, postgraduate students at Honours level who for the first time embark on a specialised study of the field of education leadership, masters and doctoral students and prospective masters and doctoral students, and scholars of education leadership. The research reported on in the chapters in the volume is also noteworthy for scholars in the field of education leadership to glean current spots of research activity in the field, to identify desiderata in the current research agenda in the field and to find suggestions as to how to take the field forward with future research. In this final chapter, the key issues and scope for future research, as these have emanated from these chapters, will be highlighted.

From Chapter 2, it transpired that a virile sector of research on education leadership exists, and that is heartening. The critical interrogation, reflection on and assessment of the body of scholarship presented in this chapter identifies a substantial list of desiderata in such research. The need for tracer studies (on the outcome of leadership programmes, feeding back into such programmes in order to improve training programmes), attention to the learning side of leadership training and research aiming at the design of leadership training fine-tuned to the contextual ecology of education in the Global South are these desiderata identified in the survey. When reading this chapter with what transpires from the other chapters in this volume, what is striking is the tendency to describe the objectives and content of education leadership training in behaviouristic terms. That is, to atomise these into small, neat, mutually isolated packets stands at variance with issues such as the need to develop distributed leadership, to cultivate entrepreneurial leadership and to find latitude or space for professional autonomy amidst a degrading, unprofessional, increasingly prescriptive working environment and the need to identify and unpack education leadership in the Global South contexts. The definition and the conceptualisation of the education leader should be much broader and more than an inventory of a number of narrow roles.

The concept of leadership should be teased out. A phenomenological explication of leadership, applied to education leadership specifically, would be a welcome addition to the literature and could provide a valuable basis for the scholarly and public discourse on education leadership. This would pave the way for a broader, more balanced and human way of conceptualising education leadership in the public and scholarly discourse, steering such discourse away from the present narrow focus on a list of atomised roles and on routine managerial functions assigned to education leaders and will likewise open new vistas for the research agenda of the field. Two apparent essential features of leadership, namely inspiration and vision (as in visionary leadership), are amongst the assignments to be unpacked in such a phenomenological explication of the phenomenon of leadership.

The impact of what is outside the perimeter of the school fence in education leadership should be acknowledged. This refers to both the education system context and the societal context. Leadership sensitivity to (education system and societal) contextual ecologies should be the subject of investigation. How leadership can harness congenial contextual elements and how innovative, ingenious leadership can be used to contextual elements adverse to an education institution fulfilling its mission can be explored and showcased for leaders of other education institutions to learn from (for an example of research on how leaders of top-performing schools have overcome adverse contextual elements, through leadership, see Wolhuter, Van Jaarsveld & Challens 2018). It was pointed out in the chapter that it is especially research situated in contexts in the Global South that would be a very valuable addition

to the present corpus of literature on education leadership, which is very skewed towards the Global North as a terrain of investigation.

Another lacuna in research about leadership that transpired in Chapter 2 is research on the very important constituency of the education project, namely parents, and the interplay between this constituency and school and teacher leaders in the exercising of education leadership. To return to and to bring together two points raised earlier, tracer studies, used to assess programmes of education leadership training's way of conceptualising education leadership, can also assist in the development of a more satisfying definition of conceptualisation of leadership (not based on a behaviouristic list of traits of leadership). It was also pointed out in Chapter 2 that education leadership programmes are caught, on the one hand, between the dilemma of acknowledging the professional status of education leaders and supplying commensurate training, and on the other hand, providing a training tailored to the substantial – and objectionable – regimen of managerial tasks education leaders are expected to fulfil. Research as to how to overcome this dilemma would be valuable.

■ Teacher leadership

In the chapter on teacher leadership, 'Collective teacher efficacy in high-performing high schools in South Africa', applying the CTES questionnaire to teachers of ten high-performing South African schools across the spectrum of well-endowed schools and poorly endowed schools, and using Bandura's social cognitive theory as a theoretical framework, the authors reported from their survey that a surprisingly high level of collective efficacy transpired. This is at odds with the general defeatism which can often be detected in both the public and the scholarly discourse of education or schools in South Africa (see Wolhuter et al. 2018). Admittedly, this research was limited to high-performing schools. But it would be interesting to repeat this study at a cross-section sample of South African schools. If at variance with the results of the study of this chapter, more in-depth studies on the kinds of schools included in the sample should be undertaken to determine how a lived experience of collective self-efficacy was created in these schools and, in particular, how leadership created such a lived experience.

■ School leadership

From the research reported in the next section, that is 'School leadership', in the chapter 'School principals of special education schools: Leadership and challenges', it transpired that the information gained from the principals confirms the literature that leaders in schools with SEND children need knowledge in addition to the knowledge stock of teachers in mainstream schools. For example, such leaders need to know the challenges SEND children

face, and they also need to know the curricula specially tailored for SEND children. The legal environment, the number of Acts that have a bearing on the SEND children and responding to them, is complicated. School leaders should counsel the parents of SEND children. All these call for specialised knowledge. In the result, it was found that the most serious challenges leaders of schools in SEND children face are relations with Provincial Departments of Education, that is, negotiating a steep bureaucracy that principals experience as insensitive and unknowledgeable (including bureaucrats that do not understand the Department's own policies on matters such as admission policies or calculating teaching posts justified by the presence of SEND children in schools), especially when it comes to admission of learners procedures, where the autonomy and powers of principals are far too little) and the second, related problem of Departments of Education not supplying these schools with the expert personnel (e.g. medical personnel, speech therapists, occupational therapists or teacher assistants in classrooms – internationally common in these kinds of schools) they need. These problems faced by principals of schools with SEND children underscores the need for innovative, entrepreneurial leadership, a point which will be returned to later, when the two chapters dealing with entrepreneurial leadership will be discussed. What can be stated at this stage is that the feedback that the researcher received from principals, and which she reported in this chapter, makes alluring case studies in South Africa (as well as internationally) of leaders of schools with SEND children who could innovatively navigate past the bureaucratic obstructions. Such research would be a valuable complement to the research reported on in this chapter. Furthermore, a strong theme in this chapter, and a theme running throughout this book, is the frustration school leaders experience because of the lack of professional autonomy that they have. It seems that a strong desideratum on school leadership research, for school leadership in schools in South Africa in particular, is to delineate the latitude of professional autonomy that a school leader should have and to use that as a basis for a campaign to secure such professional autonomy for school leaders.

In Chapter 5, the authors conducted semi-structured interviews with four entrepreneurial school leaders. The research testifies to the value of entrepreneurial leadership. However, the authors come to the conclusion that for entrepreneurial leadership to come to its right, school leaders should have freedom of reign regarding professional autonomy and decision-taking. This underscores an issue coming to the fore in several chapters in the volume, namely the need to ensure latitude for professional autonomy for education leaders. This is evidently a topic to be placed urgently and high on the education leadership research agenda.

As was explained in Chapter 1, the maintaining of school infrastructure in South Africa is an important challenge in view of the context of glaring

inequalities, the fact that for the amount of money invested in education commensurate returns are not registered and that in view of a fiscus already under pressure, it is improbable that significantly more funds will be allocated to education. In Chapter 6, Aaron Nhlapo reported on his research on perceptions of school staff and SGBs using and maintaining ageing school facilities in Gauteng. It is a cause of concern (but was not unexpected) that the researcher of the study reported on in Chapter 1 found that school staff surveyed looked to the causes of ageing and failing school infrastructure in a host of factors, such as a lack of funding and the fact that school buildings are old, but did not look at the difference good leadership can potentially make. This once again highlights bringing the potency of good, innovative, visionary leadership to the attention of school leaders, and also for research to showcase cases of exemplary, inspirational leadership.

In Chapter 7, Johannes Kayumbu and Leentjie van Jaarsveld reported on their research in Namibia on the CPD of teachers, in which they interviewed 17 principals and teachers. They found that while the participants realised the need and value of CPD, and while such development was officially scheduled, the implementation failed. The Ministry of Education did not respond to their submissions regarding training needs, speakers failed to get a rapport with those who attended the training workshops, and such workshops appear to have been lacklustre and did not inspire teachers or principals. The participants also complained that these training workshops were not properly planned and lacked expertise when it came to facilitators. The participants also reported that as teachers they are overworked and that their heavy workload does not allow them to prepare and participate in CPD programmes properly. This chapter reveals the dilemma that education leaders find themselves in. To duly fulfil their roles as leaders, they are in need of continuous education, training and development; on the other hand, they are overworked. This is the dilemma that the scholarly community should bring to the attention of top management of the education profession. The exact training needs of education leaders, in terms of CPD, also seem to be a nebulous area. Explicating the exact range of education and training needs is an assignment for the scholarly community. To link to what has been stated earlier, it is probable that exact CPD training needs will be shaped by the context in which education leaders are located. This, in turn, points to the value that comparative studies, in particular South-South comparative studies, may well have in this regard.

■ Mid-level leadership

In Part 4 of the volume, the focus was turned to the important but often neglected echelon of mid-level management. In the opening chapter (ch. 8), Sanet Myburgh and C.P. van der Vyver shared the results of their investigation into the experiences of a number of HoDs in South African schools. Their research indeed confirmed that HoDs at South African schools face high

expectations from both their principals above them and the teachers below them. However, paradoxically, these middle-level managers feel they are underutilised. Apart from having a straight message to top-level managers and to school leaders regarding improvement of practice, this research lays the basis for potentially valuable follow-up research to complement this research. Such follow-up research could aim to identify resources which can be mobilised by middle-level managers. Case studies of exemplary middle-level leadership in schools should also be carried out and showcased.

In the second chapter of the section, Louw de Beer reported on his research on the instructional leader's role of HoDs at parallel-medium primary schools, based on observation, interviews and documentary analysis in four primary schools in the Pretoria region. As was predicted in Chapter 1, from the contextual imperatives, the formation of parallel-medium schools (which is a fast-growing category of South African schools) has created a new niche and exigency for leadership at this level in such parallel-medium schools. The researcher found that whatever the merits and promise of parallel-medium schools, it has brought a tremendous increase in their workload of middle-level leaders. This includes planning, meetings and communication. Furthermore, such leaders find themselves in a complicated legal environment that seems like a minefield, and they have limited knowledge in this regard. This points to a training need to tailor education leadership programmes, both initial training and CPD programmes (in South Africa at least), and to place this on the research agenda of the field.

In Chapter 10, entitled 'Enablers of HoD curriculum leadership: Views from HoDs, principals and departmental officials', written by Tshepo Tapala, it is reported that in the experience of HoDs, there are six enablers with respect to them performing their curriculum leadership roles, namely support, open communication, planning, training and development opportunities, positive school culture and positive learner discipline. This is very instructive to the top management of schools and the education system and gives clear indications for the improvement of practice. At the same time, there is scope for research, drilling into each one of these and unpacking them.

■ Conclusion

To conclude, the authors of the chapters of this book have explicated and have displayed leadership perspectives on an assortment of critical issues besetting education systems and facing schools and have further drawn attention to some aspects of the scholarly field of education leadership that are critical in advancing the field. The research reported on in each of the chapters does not only give clear indications as to how and where to improve practice, but also opens a vista for new and future research, critical in the continual advance and relevance of the field.

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Chapter 2

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Chapter 3

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Leadership in education has been demonstrated to make a measurable and significant impact on the success of schools and the achievement levels of learners. This volume displays the scope and range of the emerging field of education leadership by means of chapters zooming in on various areas of research in the field. The ensuing chapters focusing on various areas in the field of education leadership scholarship are ordered in the following categories: chapters dealing with teacher leadership, school leadership, and mid-level leadership. The sections contain collective teacher efficacy in high-performing high schools in South Africa, leadership and leadership challenges of school principals of special education schools, entrepreneurial leadership, perceptions of school staff and school governing bodies regarding use and maintenance of aging school facilities, and continuous professional development of teachers in Namibia. The mid-level leadership section refers to challenges and expectations regarding role conflict and role ambiguity in mid-level management, instructional leader role of heads of departments at parallel-medium primary schools, and views from heads of departments, principals and department officials on enabling heads of departments for their curriculum leadership roles. All the chapters employ a variety of research methods. Some chapters are position papers and conceptual chapters, while others are based on empirical research. The research reported on in each of the chapters not only gives clear indications as to how and where to improve practice, but also opens vistas for new and future research, suggesting to scholars in the field promising ways to take the field forward with research critical to the continual advance and relevance of the field.



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aosis.2022.BK383](https://doi.org/10.4102/aosis.2022.BK383)



ISBN: 978-1-77995-221-9