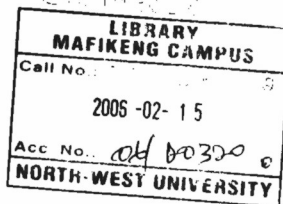


**A BEEHIVE MODEL FOR MANAGEMENT AND  
LEADERSHIP DEVELOPMENT IN PRIMARY  
SCHOOLS IN NORTH WEST PROVINCE,  
SOUTH AFRICA**



**I.R. MATHIBE**

**2005**



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LEADERSHIP DEVELOPMENT IN PRIMARY  
SCHOOLS IN  
NORTH WEST PROVINCE, SOUTH AFRICA**

**BY**

**ISAAC RAMOLOKO MATHIBE**

**A RESEARCH THESIS SUBMITTED IN  
FULFILMENT OF REQUIREMENTS FOR  
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LEADERSHIP**

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**AT NORTH WEST UNIVERSITY – MAFIKENG  
CAMPUS**

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**NOVEMBER 2005**

## DECLARATION

I Isaac Ramoloko Mathibe hereby declare that this thesis for Doctor of Philosophy in Education Management and Leadership at North-West University – Mafikeng Campus hereby submitted, has not previously been submitted by me for a degree at this or any other University, that it is my own work in design and execution, and that all material contained herein has been duly acknowledged.

Signature:  .....

Date: *17/11/2005* .....

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## DEDICATION

**This document I dedicate to the memory of the following people who made a valuable contribution to my life:**

**Joel and Johanna Mathibe**

**Neo AWT Mathibe**

**Sugar Matlakala Setshogoe**

**Gideon Mathusele Nkwe**

**Thandi Kenosi**

**Michael Rapoo**

**Kabelo Dan Sedumedi**

**Johny Tholang Masakala**

## **ABSTRACT**

The Beehive Model elevates strategic planning and management to the highest rostrum as a strategy for assisting schools to be relevant to the needs of present-day societies. Additionally, the Model regards capacity building as a necessity that should enable school managers to reflect on the aims of education and attainment of outcomes that provide a comprehensive and coordinated approach to all aspects of planning in the school.

Communication is essential in all organisations, a fact attested to by the empirical study which uncovered that communication with stakeholders has the highest response rate. However, the lowest ranked item was accommodation of diverse needs and interests of stakeholders. It would appear that for the sake of relevance to society's needs, schools should be re-aligned to accommodate stakeholders' needs and interests. It is also observed that in another set of questions the lowest ranked items were forging of trust, respect and understanding, as well as lack of understanding of schools' visions and missions. Surely, schools require a new breed of school managers who can form productive partnerships with stakeholders. It is envisaged that the Model would enhance school managers' capacity to expedite functions linked to activities such as decision-making, managing, leading and maintenance of effective personnel relationship in primary schools in North West Province. The Model should also provide the basis for integrated and coordinated education, training and development programmes for school managers in the greater South Africa.

key words: Beehive Model, talent orientation, stakeholder participation, organisational strategy, business discipline, change leadership, management development, leadership development, professional development, functional structures, pay and incentives.

## ACRONYMS

<b>ANC</b>	<b>African National Congress</b>
<b>BRAC</b>	<b>Bangladesh Rural Action Committee</b>
<b>CEO</b>	<b>Company executive officer</b>
<b>COLT[S]</b>	<b>Culture of learning, teaching [and service]</b>
<b>COPE</b>	<b>Complementary opportunities for primary education</b>
<b>CPD</b>	<b>Continuing professional development</b>
<b>CPP</b>	<b>Career progression planning</b>
<b>EMD</b>	<b>Education management development</b>
<b>ET</b>	<b>Education and training</b>
<b>ETDP</b>	<b>Education, training and development practices</b>
<b>GDE</b>	<b>Gauteng Department of Education</b>
<b>GNP</b>	<b>Gross National Product</b>
<b>Headlamp</b>	<b>Head teachers leadership and management programme</b>
<b>HoD</b>	<b>Head of Department</b>
<b>HSRC</b>	<b>Human Sciences Research Council</b>
<b>ILO</b>	<b>International Labour Organisation</b>
<b>ILST</b>	<b>Institution-level support team</b>
<b>ISIP</b>	<b>International Schools' Improvement Project</b>
<b>IQMS</b>	<b>Integrated quality management system</b>
<b>LPSH</b>	<b>Leadership Programme for Serving Heads</b>
<b>LEAD</b>	<b>Leadership in Education Apprentice Design</b>
<b>MIS</b>	<b>Management Information System</b>
<b>MLA</b>	<b>Monitoring of Learner Achievement</b>
<b>NCSL</b>	<b>National College of School Leadership</b>
<b>OBE</b>	<b>Outcomes Based Education</b>

<b>PA</b>	<b>Personnel assignment</b>
<b>PDI</b>	<b>Previously disadvantaged institution/individual</b>
<b>PDP</b>	<b>Personal development plan</b>
<b>PI</b>	<b>Performance indicator[s]</b>
<b>RSA</b>	<b>Republic of South Africa</b>
<b>SMP</b>	<b>Staff movement planning</b>
<b>TQM</b>	<b>Total quality management</b>
<b>US[A]</b>	<b>United States [of America]</b>
<b>WSD</b>	<b>Whole school development</b>

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## CHAPTER 1

### ORIENTATION AND BACKGROUND TO THE STUDY

#### 1.1 INTRODUCTION

According to Krantz and Gilmore (1989:1), external and internal pressures of change have necessitated that the concepts 'management' and 'leadership' be redefined and re-engineered to suit evolving and new learning environments. Over the years the concept leadership evolved from the heroic view of an individual to encompass a more complex engagement of potential and skills of individuals with the external and internal settings in which schools function (Van der Westhuizen 2002). Against the background of the preceding discussion Allais (1995) notes that effective management and leadership requires an understanding of dynamics of change, the ability to anticipate its impact, and the necessity to shape situations and circumstances accordingly.

In continuously changing contexts school managers need to be enabled to create flexible [but not fluctuating] adaptive learning environments in order to ensure that schools adapt to current trends in school management and leadership practices (Anthony, Peirewe & Kacmar 1993). School managers are agents of change and consequently, they are required to change their management and leadership styles by working with various stakeholders to ensure transformation in cultures of schools (Allais 1995). Tissen, Andriessen & Deprez (1999) note that in recent years consultation and partnerships have become fundamental elements to changes in school management, leadership and governance, and consequently decentralisation of authority and power – which complemented transformation in school management and leadership – took central stage in most organisations.

Just as Crawford (2004:21) contends that transformational leadership is in vogue in the present-day, Falikowski (2002) concludes that flexibility, pragmatism and ability to accommodate and adapt to changing contexts demands that expectations of all stakeholders be accommodated in schools. Adoption of new management and leadership strategies in schools is necessitated by the quest for co-operative governance as well as participatory management and leadership (Swanepoel, Erasmus, Van Wyk & Schenk 2000). Incontestably, effective participatory management and leadership are indispensable for creation of school conditions in which common ideas are used to generate collective and shared visions focused at effective accomplishment of school aims (Falikowski 2002:2).

Preceding issues enthused the researcher to investigate how the Beehive Model may be customised for management and leadership development in primary schools in North West Province, South Africa. This chapter deals with:

- Aims of the research;
- Significance of the study;
- Statement of the research problem;
- Research methodology; and
- Definition of concepts.

The following discussion presents aims of the research.

## 1.2 AIMS OF THE RESEARCH

The general aim of the study is to investigate how the Beehive Model may be used for management and leadership development in primary schools. The study had the following specific aims:

- AIM 1: To determine from literature the nature and scope of management and leadership development in schools;

- AIM 2: To determine from literature the principles of the Beehive Model;
- AIM 3: To examine management and leadership development models in developed and developing countries;
- AIM 4: To determine empirically management and leadership practices in primary schools in North West Province; and
- AIM5: To develop a Beehive Model for management and leadership development for primary schools.

The above listed aims were essential for the design of a Beehive Model for management and leadership development in primary schools in North West Province of South Africa.

### 1.3 SIGNIFICANCE OF THE STUDY

The significance of the study pertained to yielding a model that would be used for management and leadership development in primary schools. Daresh (1987) is of the opinion that ever since the school effectiveness movement proclaimed that school management and leadership are key components of competitive schools there had been widespread and general acceptance that indeed they are worthy of such importance and attention. In this respect, the study should not only provide a basis for effective school management and leadership models for primary schools, it should also contribute theoretical knowledge that would assist in the transformation of education in South Africa in line with principles of the Beehive Model namely: stakeholder participation, talent creation, structures, organisational strategy, change leadership, pay and incentives as well as business discipline (Sacht et al. 2003:1).

Mncwabe (1990) notes that if there are to be significant changes in South African schools, personnel at all levels needs to be empowered to cope with changes in the

evolving educational landscape. Mncwabe's view is echoed in current debates on whole school development [WSD], and it is concluded that effective school management and leadership is linked to, and inclined not only by learner performance, but also by stakeholder participation. However, the essence of transformation in schooling in the RSA is also amplified by the fact that the struggle for the democratisation of South Africa in the pre-1994 era did not only result in erosion of the culture of learning, teaching and service [COLTS], but it also resulted in dysfunctional schools particularly in predominantly Black communities (Mathibe 1998).

Addressing the situation presented in the preceding discussion demands a profound shift of attitudes from those with a stake in education in order to build relationships with those who can support learning (Lumby 2003). The study should suggest modes through which school managers may ensure that schools become functional in order to promote social development and reconciliation in society. School management and leadership in the present dispensation need to be tailored for the evolving educational landscape typified by social transformation and sustainable human resource development (Noe, Hollenbeck, Gerhart & Wright 2000). It is observed that the Beehive Model may assist in rallying the energies of different stakeholder groups not only to ensure participatory management and leadership in schools, but also to ensure collective action towards achievement of required educational purposes.

Ndengwa, Mureithi and Green (1987:6) contend that development requires that one accept the concept of genuine participation in which stakeholders agree on organisational priorities and define issues such as social justice. Genuine participation presupposes bringing people together to work effectively in teams, to inspire loyalty to group aims and making a valuable contribution towards WSD (Vincola 2000). It is envisaged that the study would yield data that contributes to the democratisation and transformation agenda as undertaken by the South

African government. In terms of the Education White Paper 6 of 1996, democratic organisational leadership makes considerable demands on school managers and educators not only to engage in shaping and delivering quality education, but also on re-engineering relationships amongst stakeholders (Department of Education 1996). Inherent in the preceding discussion is the ideal for openness and transparency in the schooling system with an aim of ensuring that all individuals engaged in the education enterprise have access to information about what transpires in the school situation.

According to Ndengwa et al. (1987:15) many weaknesses in development, in both planning and execution, are related to poor management and leadership in the sense of incomplete and unsound management and leadership processes. The implication hereof for the South Africa schooling system is unpretentious and unequivocal: the evolving schooling context requires new leadership and management strategies (Van der Westhuizen 1999). For this reason, while the research is aimed at extending the body of theoretical knowledge regarding the topic from a South African perspective, the universal and global nature of knowledge is not to be ignored. In the same vein, Holden (1998:112) is of the opinion that science and scholarship know no frontiers, and Ohmae (1995:96) purports that the challenge in present-day societies is not to solve all problems locally, but rather to make it possible to solve them by harnessing global resources.

An attempt would be made to determine how developments in the RSA and other countries compare in order to provide indicators of the extent of school management and leadership practices in individual countries and throughout the world (Dekker & Van Schalkwyk 1995). It is noted that the global and universal character of the study requires that management and leadership development models in the South Africa schooling context be juxtaposed with other schooling

contexts around the world. The preceding discussion on the significance of the study is linked to the rationale for the study.

#### 1.4 RATIONALE FOR THE RESEARCH

The essence of management and leadership development for school effectiveness is indisputable and consequently, scholars and writers such as Day and Lord (1988) see leadership and management as key concepts in understanding and improving schools. Furthermore, Bennis (1989:15-16) notes that school managers are important for effectiveness of schools since they guide changes in schools and they alleviate the public's concern for quality in education. There seems to be concurrence between Day and Lord's views as well as Bennis' assertion on the significance of management and leadership for effective schools development. In countries where there is universal transformation, efficacious management and leadership are elevated to the highest rostrum (Gibson, Ivanevich & Donnelly 2000).

According to Van der Westhuizen (2000:146), experience in, and knowledge of contemporary management and leadership models promotes effective leadership and upholds the notion of efficacy, quality and improving management and leadership in schools. In the same vein, Ndengwa et al. (1987:22) contend that concentration on people empowerment raises productivity, operational autonomy and innovation. It is envisioned that the study would locate issues pertaining to management and leadership on national and global contexts. Against the background of the foregoing discussion Mbeki (2000a) states:

... Nowhere in the world has sustained development been attained without an effectively functioning system of education, without universal and sound primary education, without an effective and efficient higher education and research sector, without equality of educational opportunity...

While Mbeki's assertion makes sense, many schooling systems do not fulfil their mandates to society because of poor management and leadership since power and authority are centralised around school managers (Sullivan 2000). The general negativity toward, and lack of commitment in schools may be ascribed to centralisation of power and authority around the school manager and not around the functions of the manager per se. According to Mncwabe (1990), the rigidity which one finds in the schools referred to in the preceding statement does not only stunt the schools' capacity to develop, it also leads to schools that are dysfunctional and unproductive. Implementation of principles of the Beehive Model should ensure that schools are in sync with the quest for national development and the quest for school effectiveness (Department of Education 1995). In addition, the Model should capacitate managers to engage stakeholders in developing strategies that would effectively ameliorate conditions in schools.

Having discussed the rationale for the study, the following discussion focuses on statement and clarification of the research problem.

### 1.5 STATEMENT OF THE RESEARCH PROBLEM

The problem that is researched is that of lack of appropriate models for management and leadership development for primary schools particularly in South Africa. In South Africa, unlike in the USA and UK, school managers are not trained prior to being appointed to management and leadership positions (ETDP SETA 2002). In addition, Bush (2003) notes that the cellular structure of schools compounds problems in school management and leadership since it is difficult for school managers to share their skills, knowledge, information and resources to ensure the efficacy of leadership in their schools. As part of management and leadership development in schools, one would expect that school managers would be empowered and trained to:

- Create orderly schools environments in which effective teaching can take place;
- Ensure that collaborative partnerships are forged;
- Ensure that administrative procedures are in place and operate effectively; and
- Ensure educators' accountability and assure quality of educators' work (ETDP SETA 2002:55).

From the preceding discussion it may be deduced that school managers need training in management and leadership in order to ensure accountability and effective discharge of duties in schools (Van der Westhuizen 1999). Lack of accountability in the schooling system is explicated by Ginsberg (1998) when he mentions that while the percentage of money spent on education in the RSA in the 1998/1999 period was 6.9% of the gross national product [GNP] – which was higher than the averages of Africa (5.9%), the Americas (5.4%), Asia (3.3%) and Europe (5.5%) – the pass rate remained low and only 40% of learners completed secondary schooling. One conclusion that can be drawn from Ginsberg's assertion is that educational success rates are measured on the basis of quantifiable data provided by pass rates, and schooling in South Africa is not doing successfully in this regard.

The ETDP SETA (2002:51) notes that South Africa's recent participation in the Third International Maths and Science Study [TIMSS], the repeat study [TIMSS-R] and the Monitoring of Learner Achievement [MLA] study showed that South African learners performed poorly compared to their international counterparts. The outcomes of the South Africa schooling system are indicative of deficient management and leadership in schooling in general (Ginsberg 1998). The preceding discussion of the research problem assisted in the formulation of the research questions.

## 1.6 RESEARCH QUESTIONS

Issues raised in the preceding discussion resulted in the formulation of the following research questions:

- What are major challenges for management and leadership development in schools?
- What is the significance of professional development in present-day schooling systems?
- Which model is appropriate for management and leadership development in primary schools?

Preceding research questions were vital to the study and they influenced the choice of research methods.

## 1.7 RESEARCH METHODS

Traditionally, the concept 'research method' refers to techniques associated with the positivistic model for eliciting responses to predetermined questions, recording data, describing phenomena and performing experiments (Cohen & Manion 1989). It is acknowledged that research methods used in the study are influenced by perspective from which the researcher viewed the research problem. In the investigation scientific research methods – which advance the use of quantitative and qualitative approaches – were used for both collection and interpretation of data.

### 1.7.1 Population and sampling

The study was conducted in North West Province, South Africa, and particularly in Bojanala East and Bojanala West Regions since they are densely populated. Out of the total number of (n=315) in primary schools in Bojanala East [185] and Bojanala Regions [130]. Stratified random sampling was adopted to select 200 school managers, 200 HoDs and 200 educators from primary schools in Bojanala

East and Bojanala West Regions to participate in responding to the questionnaire. According to Van der Walt (1985:78), stratified random sampling is appropriate for selecting a heterogeneous population because the inclusion of smaller subgroups percentage-wise is to be ensured. Stratification consists of the universe being divided into a number of strata which are mutually exclusive, and the members that are homogeneous with regard to some characteristics such as gender, home language, location or age (Mitchell & Jolley 2001:497).

Stratified random sampling guaranteed that the different groups or segments of the population acquired sufficient representation in the sample.

### 1.7.2 Data analysis

The data collected was analysed, interpreted and recorded using different statistical techniques. For example, the researcher used:

- Standard deviation to measure the central tendency and variations in the research;
- Frequency tables to indicate the age distribution, location, and gender of respondents;
- T-tests to analyse the responses of subjects;
- Pearson correlation coefficient to provide a numerical representation for indicating both the strength and direction of a bivariate relationships in responses based on a continuum ranging from +1.0 at one extreme to -1.0 at the other extreme, with 0.0 at the mid-point; and
- Tests of statistical significance to ascertain whether results obtained by statistical data were statistically significant. Chi-square tests were conducted to compare test statistics and theoretical distributions to discover degrees of freedom in order to validate the stated hypotheses.

The empirical study was supplemented by data collected through literature study.

### 1.7.3 Literature study

Literature study entailed critical selection and scrutiny of primary and secondary sources for authentic and relevant information on effective school management and leadership. Official records which provided important information on the educational policy and which gave the up-to-date information on management and leadership development were used. Such studies included the South African Schools Act of 1996, Further Education and Training Act of 1998 and the Higher Education Act of 1997. Additional sources such as the Employment Equity Act of 1999 and the Skills Development Act of 1999 were also used.

Secondary sources that were consulted included books and periodicals on school leadership and management practices. The following key words were used in conducting a Nexus search for secondary sources:

- Management development in schools;
- Leadership development in schools;
- Beehive Model;
- Stakeholder participation; and
- Talent creation.

The following discussion focuses on the definition of the concepts related to the Beehive Model for management and leadership development.

## 1.8 DEFINITION OF CONCEPTS

The following concepts that have a bearing on an understanding of the Beehive Model were defined in order that readers understand them as they were used in the study.

### 1.8.1 Leadership

The World Book Dictionary (1989, sv 'leadership') defines the concept 'leadership' as 'control; being in charge'. According to Webster's New World Encyclopaedia (1990, sv 'leadership') the concept 'leadership' refers to 'a process or technique of managing, organising and operating a business'. According to Prinsloo (1991:135), the concept 'leadership' implies 'inducing followers to act for certain goals that represent values and motivations as well as aspirations and expectations of school managers and followers'. Moorhead and Griffin (1989:347) define the concept 'leadership' as:

... The use of non-coercive influence to direct and co-ordinate activities of group members towards accomplishment of organisational goals. Leadership is the set of characteristics attributed to those who are perceived to employ such an influence effectively...

Educational leadership is dependent not on the use of influence, but on a cautious guidance of behaviour in a school, and Kaler (1999) is of the view that by accepting the leadership role, the school manager becomes the initiator and supervisor, a listener and problem-solver, a coordinator and conciliator. In the light of the preceding statement, Robinson (1992) states:

... A leader is not appointed because he knows everything and can make every decision. He<sup>1</sup> is appointed to bring together the knowledge that is available and then to create the prerequisites for the work to be done. He creates systems that enable him to delegate responsibility for day-to-day operations...

The meaning of educational leadership referred to in the study is encapsulated in leading and guiding as universal human activities. In this study, the concept 'leadership' refers to what school managers stand for and believe about schooling, as well as their roles in enhancing the quality of education. The concept 'leadership' also entails how schools develop structures and how they are

operated. The following discussion focuses on the definition of the concept 'management'.

### 1.8.2 Management

Usually people use the concepts 'administration' and 'management' intermittently, and as if they refer to the same thing or practice (Mwosa 1987:109). According to Mwosa (1987), 'administration' is usually thought of as accepting goals from outside the system, as depending upon resources from other systems and being instructed in the execution of functions while 'management' is usually thought of as developing goals within the system. From the preceding definition it can be construed that while administrative functions are mandatory, 'management' functions emanate from inside the system. To this effect, Mwosa (1987:109) states:

... Management is a process of leading organisational effort in pursuit of organisational goals. In co-ordinating the achievement of organisational goals the school manager engages in planning, organising, motivating, staffing and controlling. There is a general agreement that the two salient functions of management are deciding [planning] and doing [implementing]...

From the background provided by Mwosa's definition of 'management' one can deduce that 'management' is an active, opportunity-seeking, change-orientated and developmental concept. If this is the case with the function of 'management', then there is validity in what Wanjui (1987:123) states when he defines 'management' as an activity that organises human and physical resources into useful and effective channels to achieve pre-stated objectives. Notably, Mwosa (1987:109) concludes that 'management' involves making analyses, judgements and decisions with an aim of achieving a school's strategic objectives. However, Pascale and Athos in *The Art of Japanese Management* (1981), as cited in Mwosa (1987), note that culture has an effect on 'management' when they state:

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<sup>1</sup> The male reference - he - is used to include both males and females.

... Managerial reality is not an absolute; rather, it is socially and culturally determined across all cultures and in all societies. Human beings coming together to perform certain collective acts encounter certain problems that are related to establishing, directing, co-ordinating and motivating. Culture affects how these problems are perceived and how they are resolved. Social learning also establishes horizons of perception...

In this study the concept 'management' refers to an organised and effectively planned endeavour to achieve desired results through efficient resource mobilisation and utilisation. For this reason, it may be construed that the purpose of management is to ensure that the school's vision and mission statements are attained in an effective and efficient manner.

The following discussion focuses on the definition of the concept 'professional development'.

### 1.8.3 Professional Development

The Oxford Pocket Dictionary (1996, s.v. 'professional') defines the concept 'professional' as 'of, belonging to or connected to a profession; skilful, competent; worthy of a professional; engaged in specific activity as one's main paid occupation'. From the preceding definitions of the concept 'professional' it may be construed that the concept 'professional' is multi-faceted and it may refer to one's behaviour, being competent in one's work and one's training for occupation. In the same vein, the Oxford Pocket Dictionary (1996, s.v. 'development') defines the concept 'development' as 'developing or being developed; a stage of growth or advancement; full grown state'. Mwosa (1987:108) defines 'development' as attaining an effective life, one that is congruent with fundamental values and yet attainable and sustainable with the present and future resources.

From Mwosa's definition it is apparent that 'development' is something people themselves have decided they want and it fits in with their values. On the other hand, Mwosa (1987:108) notes that 'development' refers to the improvement of the well-being of people; a high and growing per capita income; a greater equality in the distribution of income and the transfer of economic power to the citizens. In parallel disposition, Ndengwa (1987:57) defines 'development' as:

... Increased differentiation of roles to cope better with change; growing equality in allocation of society's scarce resources, and particularly in the state of allocation of these; enhanced capacity (and performance) of social institutions, especially those associated with the state; and finally increased choice and enlarged opportunities in decision-making processes in society...

Against the background of the preceding discussion it would appear that 'professional development' is linked to the achievement of qualitative and quantitative progress by an organisation. According to Reitzug (2002:2), professional development can be thought of as processes and activities designed to enhance the professional knowledge, skills, and attitudes of personnel so that they might, in turn, improve learning. In this study 'professional development' refers to a systemic expansion of skills and knowledge – which is observable in the practical implementation of management and leadership responsibilities.

The following discussion focuses on the definition of the Beehive Model.

#### 1.8.4 Beehive Model

The concept "Beehive Model" is comprised of concepts "beehive" and "model". The Oxford Pocket Dictionary (1996, s.v. 'beehive') defines the concept 'beehive' as 'artificial shelter for a colony of bees; busy place'. A 'beehive' is typified by activity, and the analogy of a beehive is significant for school management and leadership in the sense that the school should be a busy place; learners should learn, educators should educate and managers should manage. On the other hand

Sacht et al. (2003) note that models symbolise organisations from various levels. The Oxford Pocket Dictionary (1996, s.v. 'model') defines the concept 'model' as 'simplified description of a system to calculate and make predictions; particular design or style'.

The Beehive Model has been found to be a robust and practical model which is useful across a number of organisational settings, including a major banking group, a poultry producer, and a multinational brewing organisation to name, but a few (Sacht et al. 2003). The Model is based on seven principles namely: stakeholder participation, talent creation, business discipline, structures, change leadership, pay and incentives as well as business strategy. In this study the concept Beehive Model refers to the management and leadership development model that ensures an integrated approach to capacity building for school managers and leaders.

Since basic concepts have been defined, the following discussion focuses on the demarcation of the study.

### 1.9 DEMARCATION OF THE STUDY

The research aimed at investigating how the Model could be used for management and leadership development in primary schools. Just as research cannot be conducted in a vacuum, Venter (1989) notes that research should be located in spatio-temporal modes or moments. As such, the research focused on challenges posed by school management and leadership development imperatives in the post-1994 period particularly in primary schools in North West Province of South Africa.

Data on management and leadership development in primary schools were collected and studied from literature sources and education practitioners. The

expansiveness of data collected necessitated that the research report be divided into chapters. The chapters were arranged according to pockets of data they contained as indicated in the following summary:

- Chapter 1 focused on orientation and background of the study;
- Chapter 2 dealt with a description of the nature and scope of organisational management and leadership, further definition of concepts, and management and leadership approaches;
- Chapter 3 dealt with elucidation of principles of the Beehive Model;
- Chapter 4 focused on an assessment of management and leadership development models in developed and developing countries;
- Chapter 5 dealt with empirical research, research instruments, administrative procedures and pre-testing the questionnaire;
- Chapter 6 focused on data analysis and interpretation;
- Chapter 7 focused on a Beehive Model for management and leadership development in primary schools; and
- Chapter 8 dealt with summary, findings, recommendations and conclusion.

#### 1.10 SUMMARY

During the past two decades studies on school management and leadership proliferated and consequently, there had been increasing focus on what was happening inside schools. As more was learnt about the complexity of school management and leadership, focus was also shifted from making decisions about schooling to paying more attention to how school managers incorporated new ways of working into every facet of their operations. It is observed that the quest for efficacious school management and leadership in schools necessitate the adoption of integrated management and leadership development models such as the Beehive Model.

It is envisaged that research on the Beehive Model for management and leadership development should provide education planners and educators with concrete plans to manage transformation and innovation in schools. School managers should benefit from the Beehive Model since it suggests specific strategies to enhance stakeholder participation, talent creation, and business discipline in the school situation. Furthermore, the Beehive Model strives to create meaning for changes that are needed and instituted in the school situation. The Model also provides opportunities for selection of appropriate business strategies and departmental configurations that should work efficaciously in specific schools situations. Data collected from an empirical survey on principles of the Beehive Model should also ensure that management and leadership development programmes provide support, information, security and motivation to stakeholders in order to achieve school aims and objectives.

## CHAPTER 2

### CONCEPTUALISATION OF MANAGEMENT AND LEADERSHIP DEVELOPMENT IN SCHOOLS

#### 2.1 INTRODUCTION

According to Van Dyk (2002:8), in informed circles it is often stated that problems with management and leadership began before the Industrial Revolution when cottage industries became so large that owners were obliged to employ 'strangers' in addition to family members. It is noted that the emergence of production cells, and the concomitant quest for improvement of the quality of products resulted in the significance of management and leadership in production systems (Mason 1998). Similarly, the advent of management and leadership in industries required decisions on the relative position of managers and leaders as compared with subordinates, and the obligations of management and leadership towards subordinates (Van Dyk 2002:8).

From the preceding discussion it is observed that management and leadership practices are epoch and situation-bound. The researcher is of the opinion that management and leadership are related to the conventional philosophies that are derived from spatio-temporal echelons affecting humanity. To this effect, Farnham (1990:21) notes that a paternalistic management and leadership philosophy adopted during the Great Depression of the 1930s served its purpose, but it may not be relevant today. Surely, a management and leadership philosophy is underlined by spatio-temporal influences, and Reitzug (2002:1) contends that the quest for promoting educated intelligence necessitates that professional development be viewed as an on-going part of the daily life of the school in the present-day.

The discussion in this chapter would thus focus on the essence of management and leadership development with particular emphasis on the following:

- Conceptualisation of management, leadership and professional development;
- Essentials of management and leadership development; and
- Models for organisational management

The following discussion focuses on further definition of operational concepts in the research.

## 2.2 FURTHER DEFINITION OF CONCEPTS

According to Goddard (2003:13), an understanding of the concepts management and leadership seems to be elusive because the two concepts do not reside on only one point of view. It is noted that management and leadership are also located in situations, personalities and behaviours of people (Boje 2003). Gardner (2000) notes that a lot of inquiry has been apportioned to the concepts management and leadership and it is not accidental that the concepts have multitudinous definitions. On the other hand, Goddard and Forster (2001) conclude that there is a need for leaders to immerse themselves in the community of learners since those in marginalized communities are equally marginalized. Of interest is that different management and leadership strategies have been adopted over the years in order to ensure efficacy in production systems.

### 2.2.1 What is leadership?

There is no single definition of the concept 'leadership', and as a result different opinions would be used to define and explain it in this study. Van der Westhuizen (1999) notes that some people think of leadership as an emotional process. On the

other hand, Gerber et al. (1987) contend that while there are those who confuse leadership with status, power, or official authority, it – leadership – gives rise to proactive, visible conduct characteristic of interpersonal relationships which are fundamental for pursuing certain objectives by means of influencing people. Goddard (2003:13) regards leadership as a concept with multi-faceted and multi-dimensional characteristics where values, goals and beliefs of the school manager give meaning and purpose to duties that are to be implemented.

Leadership requires eliciting cooperation from a large network of people, and keeping key people in that network motivated and aligning them to a shared vision (Kotter 1990). According to Syrett & Hogg (1992:5), leaders are concerned about the ‘big picture’ and the long-range future of an organisation, and consequently they create and articulate organisational visions. Hodgetts (1982:342) views leadership as a set of interpersonal behaviours designed to influence followers to cooperate in the achievement of objectives. Leadership per se focuses and sets direction for an organisation, and it also provides energy and instruments for achievement of organisational goals, and to this effect Gunther & Ribbins (2002:412) state that:

... We are also aware that while we may continue to work for the democratisation of knowledge through professional practice the struggle is more than just asking what we know about leaders, leading and leadership... but is also about structures that seek to determine what is worth knowing and who the knowers are...

The vastness of definitions of the concept leadership did not assist the researcher to come up with a succinct definition of leadership. It is noted that the concept ‘leadership’ also denotes an act or action that is performed by a person in charge of an organisation, institution or school (Hodgett 1982; Syrett & Hogg 1992:5). In this instance, a school manager should learn how to lead as well as to manage (Kotter 1990), and ‘lead’ in this context denotes a particular action: leading. In addition, ‘leadership’ connotes a role that is performed by the one in charge, and Hendrix (2004:1) notes that leadership deals with change, inspiration, motivation,

and influence. Leadership – in this sense – fulfils the role of guiding and inspiration, and to this effect Wenger (2003:230) states:

... People must know each other well enough to interact productively and who to call for help or advice... they must trust each other, not just personally, but also in their ability to contribute to the enterprise or the community, so that they feel comfortable addressing real problems together and speak truthfully...

From Wenger's view one can deduce that leadership involves trust, interaction, companionship, independence, genuine communication and cooperation. According to Werner (2002a:358), leadership dictates that school managers define parameters under which subordinates function, and this indicates that managers may leave the decisions for problem-solving to subordinates. However, at times the school manager may act as a group member, and consequently the manager does not have to see leadership as being dissociated with the real situation or shop floor (Falikowski 2002:2). In the light of the preceding statement Carrel et al. (1995) list the following points on the significance of leadership in an organisation:

- Contributing to goal accomplishment and survival in an organisation;
- Supporting and successfully implementing given organisational strategies;
- Creating and maintaining the competitive advantage for the organisation;
- Improving the responsiveness and motivation potential of the organisation;
- Increasing the number of feasible strategies available for the organisation;
- and
- Improving cooperation between human resource department and line managers.

Leadership covers an essential area in organisational life, and it determines the extent to which organisational goals are met. For example, instructional leadership may be provided to ensure improvement of standards and quality of education in schools. This is important since in recent years the effectiveness of teaching and education in general is viewed as being the key to the economic well being of

nations. For this reason, Carrel et al. (1995) view leadership as being a determining factor in attainment of organisational goals. Similarly, Covey (1989) states that:

... In business, the market is changing so rapidly that many products and services that successfully met consumer tastes and needs a few years ago are obsolete today. Proactive powerful leadership must constantly monitor environmental change, particularly consumer buying habits and motives, and provide the force necessary to organise resources in the right direction...

From the preceding discussion it can be construed that Covey regards powerful leadership as a necessity for relevance in production capacity of organisations. Appropriately, Covey (1989) contends that leadership is concerned about 'clearing the right forest', and consequently organisations need leadership to give direction to their visions and missions by:

- Working towards desired results: creating clear understanding of what is to be accomplished
- Stating guidelines: setting parameters for operation
- Providing resources: providing human, financial, technical
- Exemplifying accountability: setting standards of performance
- Indicating consequences: specifying what will happen as a result of evaluation (Covey 1989:174).

An elaborate discussion on leadership has been provided, and in this study the concept leadership has a dual meaning as it refers to an action of leading, and a role of the person in charge in an institution namely guidance and inspiration that is provided with an aim of motivating people to achieve set objectives. In schools, professional leadership should be provided to ensure that educators participate in decision-making structures in order to ensure that they contribute meaningfully to the school's vision and mission statements.

The following discussion focuses on an overview of the development of leadership paradigms in the past until at present.

### 2.2.1.1 An overview of the development of leadership paradigms

The essence of leadership in organisations, and particularly in schools should not be minimised. According to McGlynn and Stalker (1995), leadership is essential in schools in order to provide for the universal recognition of the right of every child in every classroom, in every school to receive a high quality education appropriate to their needs and aptitudes; and the need to equip learners with the kind of education that will enable them to contribute to increasingly complex and changing society.

Education systems develop mechanisms to provide for and ensure effective management and leadership for the carrying out of functions in schools. For example, inspection as a mode of monitoring education, offers the following major benefits (Wilcox & Gray, 1994):

- . It gives inspectors an opportunity to observe classrooms and, thereby, a better basis for discussing the development of the school with head teachers;
- . It gives school inspectors an opportunity to learn about the schools, the head teachers, the teachers, the curriculum, and the students and indicates which way forward;
- . It can be a potential learning experience for those involved;
- . It should provide useful information for parents in their choice of schools;
- . It leads to a better understanding of schools;
- . It enhances staff cooperation and public recognition that the school is basically on the right track; and
- . It boosts staff morale.

It is noted that leadership practices evolved over the years, and between the 1940s and the present-day, leadership paradigms oscillated from one end to another. The oscillation referred to in the preceding statement was precipitated by the quest to improve leadership approaches in different organisations at different times. For example, the trait leadership approach was suitable for the understanding of leadership at a particular time in history. As a result, when new needs surfaced in societies there was a reciprocal need for new approaches to leadership to evolve. The study of the development of leadership paradigms is thus influenced by spatio-temporal factors as indicated in Table 2.1.

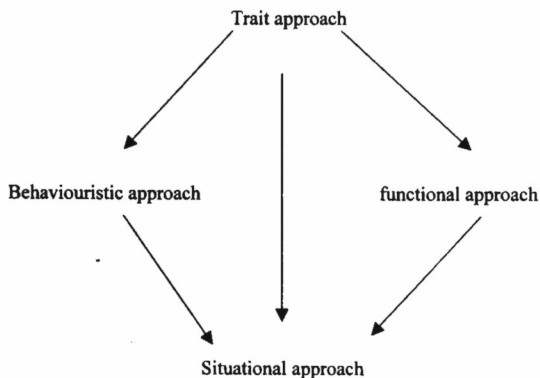
Table 2.1: The leadership box

Trait/universal principles 1800 to 1940s with revival in the 1990s	Behaviour are transactional 1940s to 1970s with revival in 2001	Situational Early 1960s to the present; dead but will not vanish	Power From BC, rediscovered from one generation to next	Charisma/Transaction Late 1800s Rediscover In 1970s and revival In 1980s and 1990s
Stodgill 1948 McGregor 1960 Theory X and Y McClelland 1965 stories Katz 1955 skill taxonomy Yukl 1989	Lewin et al. autocratic, democratic & laissez faire Flanagan 1951 behaviour incidents Fleischmann 1953	Fiedler 1964 Contingency model Evans, House et al. 1970 Path-goal theory normative decision style model		Weber 1947 House 1977 Bass 1985 Conger & Kanungo 19
Flanagan 1951 critical incidents Boyatzis 1982 Traits & competencies	Merton 1957 Role theory Yukl 1971 Participative leadership Mintzberg 1973 managerial roles	Boje 1980; 2001 PSL <sup>2</sup> Graen et al. 1975 LMX situation model Kerr & Jermier 1978 substitutes House et al. Globe Projects Jean-Paul Sartre situational leadership	Machiavelli French & Raven 1959 Sources Social exchange Graen et al. 1975 vertical dyad empower	Weber on Charismatic Transformation & Transactional Burns 1978 Transforming Bass 1985 Transformational Bennis & Janus 1985 Transformational Schein 1985

Adapted from Boje (2003:1-2).

The shift in perceptions about leadership, as indicated in the preceding Table 2.1, does not imply that there is one best leadership strategy. Just as organisations undergo changes due to environmental influences, technological advancement and the evolution of new needs in communities they serve, leadership approaches emanate from the need to address situational and production issues (Mabale 2004). It would appear that the conception of leadership would be related to the maintenance of the state of equilibrium in organisations. The researcher is of the opinion that since life offers no guarantees, then leadership approaches evolve in order to address tangible and real problems experienced in organisations within the limits and parameters of spatio-temporal factors. Schilbach (1983:32) conducted a series of extensive investigations in South Africa and developed the following leadership typology indicated in Figure 2.1.

Figure 2.1: A typology of approaches to leadership



From the preceding Figure 2.1 it would appear that all the approaches lead to the situational approach to leadership. The following discussion presents a brief

overview of the typology of approaches to leadership in order to elucidate further on how leadership changed over the course of time.

### 2.2.1.2 The trait approach to leadership

According to Boje (2000:1) the trait approach to leadership gained ground during the 1940s. The trait approach presents leadership from the perspective of an individual's personal characteristics, and Allais (1995) notes that the approach derives from the so-called 'great man theory'. The trait approach is based on assumptions that there are ideal traits against which a person's leadership potential may be measured or predicted. For example, Gerber et al. (1987:329) list the following traits as prerequisites for effective leadership:

- Physical and mental well-being;
- A subservient spirit [humility];
- Altruism;
- Adaptability and flexibility; and
- Understanding and character.

The traits listed by Gerber et al. disclose people's perceptions about characters of effective leaders and characteristics of effective leadership. Research conducted on such diverse groups as children, the business sector, professionals and military personnel has not isolated a single uniform trait or group of characteristics which distinguish the leader from members of his/her group (Hodgetts 1982:342). Indubitably, traits associated with effective leadership in one context may not be evident in another context. According to Boje (2003), certain traits such as emotional intelligence, high motivation and possession of a spirit for good intra-personal and inter-personal relations are required for effective leadership.

Divergence of thought against the trait approach led to the ascendancy of a functional approach to leadership.

### 2.2.1.3 The functional approach to leadership

The functional approach is based on the premise that a leader cannot achieve anything in isolation (Allais 1995). As it appears from Allais's assertion, a leader is dependent on subordinates or a group of subordinates to achieve the desired results in an organisation. Furthermore, leadership cannot be assessed in isolation since people – in their capacity as leaders – perform specific functions in an organisation (Allais 1995:289). However, in any organisation, functions are not necessarily restricted to managers and consequently, any member of a group may perform leadership functions under specific circumstances. Gerber et al. (1987:331) regard the following three functions as being essential for effective leadership:

- Procedural functions which indicate:
  - ✓ Encouragement, permission for, and selective restriction of group participation;
  - ✓ Problem setting, diagnosis and interpretation;
  - ✓ Collecting information, gathering of facts and acquiring ideas.
- Substantive functions which indicate:
  - ✓ Independent contributions;
  - ✓ Showing concurrence and difference of opinion;
  - ✓ Determining facts by means of research.
- Group maintenance functions which indicate:
  - ✓ Displaying behaviour which should be conducive to relieving tension;
  - ✓ Encouragement, compliments, humour; and
  - ✓ Creating situations for the satisfaction of certain individual needs.

It is noted that the significance of the functional leadership approach is related to group maintenance (Everard & Morris 1996). Allais (1995:289) is of the opinion that functions refer to the quality of interpersonal relationships [group maintenance functions], the importance of job structuring [procedural functions], and the extent to which a group is capable of striving for goal achievement [substantive functions]. One should not lose sight of the fact that leadership retracts from personal attributes, and one needs to know oneself and be able to make realistic observations of one's capabilities and limitations. School leadership requires one to reflect on job performance, attitudes towards others [including both their strengths and weaknesses], and opportunities for further development.

The following discussion focuses on behaviouristic approach to leadership.

#### 2.3.1.4 Behaviouristic approaches to leadership

Lewin, Lippit and White (1938); Bass (1981); and Yukl (1989) are some of the theorists who studied and shaped behavioural approaches to leadership (Boje 2000:3-16). According to Allais (1995:290), behaviouristic theorists advocate an investigation into behaviour projected by effective leaders for an understanding of the concept leadership. Everard and Morris (1996) state that leaders should remember that they are part of the bigger system, and they are interdependent with the rest of the workforce that serves them [leaders] as they serve them [employees]. In addition, Daniel (1999) concludes that leaders must provide direction by framing key questions orientating people to new roles and responsibilities. Table 2.2 illustrates assumptions of Theory X and Theory Y.

Table 2.2 Assumptions of Theory X and Theory Y

X beliefs	Y beliefs
People are inherently lazy	People perceive work as natural as play
Most people are only interested in money	People want to make worthwhile contributions
People do not want responsibility	Most people are keen to demonstrate their ability
The average person does not have much ambition	People are creative and strive for self-actualisation
Most people are not capable of solving problems	People are problem-solvers by nature

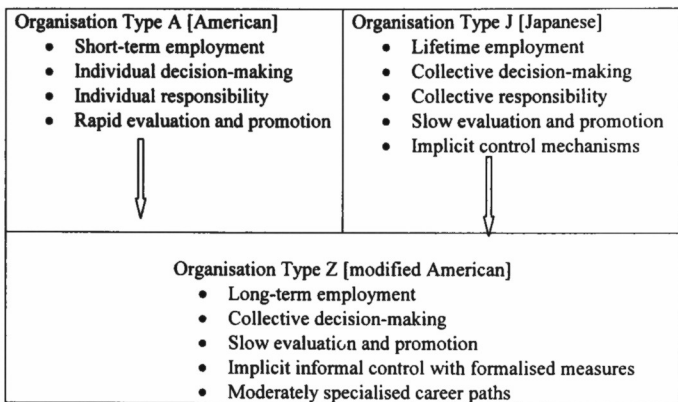
Adapted from Van der Westhuizen (1999).

From Table 2.2 it would appear that people have bi-polar behaviours towards work: they spurn work just as they yearn for it. As a result, Van der Westhuizen (1999:197) observes that McGregor's theories may be misunderstood, and be misinterpreted. McGregor's Theory X and Theory Y have their own shortcomings, and in 1981 Ouchi propounded Theory Z on management and leadership after he had identified gaps in Theories X and Y (Van der Westhuizen 1999:199). Hoy and Miskel (1991:216) note that Theory Z is an amalgam of business practices in the United States and Japan. Directive leadership – as promoted by Theory Z – is necessary for reducing role ambiguity in work situations (Middlehurst 2000). On the other hand, Van der Westhuizen (1999:199) states that Theory Z acknowledges that:

- A person has a free will and normally uses it positively;
- A person is open to both good and evil;
- Human reason provides further motivational potential; and
- Interdependence is a basic form of interaction.

Figure 2.2 provides a synopsis of the comparison of the American and Japanese business practises and emergence of Theory Z.

Figure 2.2: The evolution of organisations



Adapted from Ouchi (1984).

From the preceding Figure 2.2 one may conclude that Theory Z introduced a new conception of an employee since it promotes values of intimacy, trust, cooperation and egalitarianism in an organisation. Theory Z appears to be relevant for school management, and according to Ouchi (1984) it may be indispensable for involving staff in collective decision-making processes. Davenport (2000:32) lists the following points as being linked to Theory Z in education institutions:

- Accountability;
- Knowledge transfer;
- Sharing of resources;
- Direct involvement;
- Benchmarking achievements; and
- Putting service in an institution's mission.

Just as McGregor and Ouchi had their assumptions about the influence of behaviour on leadership, Schein developed a series of assumptions about human

beings that are relevant for leadership and management in private sector organisations (Robinson 1992). According to Dawson (1993), Schein's rational-economic assumptions are underpinned by hedonism and claims that people's behaviour is aimed at the greatest advantage a person may get over others in the workplace. It appears that the rational-economic assumptions are based on the premise that people are motivated by economic incentives such as money and bonuses (Werner 2002a:354). Schein's view is that people's behaviour is directed towards actions that would result in economic gain (Mabale 2004), and this suggests that people may be manipulated to be productive through the use of money and incentives to instigate transactional leadership.

Evidently, in the case of the rational-economic assumptions managers wield a lot of power since they control economic gains (Werner 2002a:354). Mabale (2004) notes that the view expressed in the preceding statement is linked to behaviourism through which responses are generated through extrinsic rewards. Similar to rational-economic assumptions is a view that people's emotions are irrational because they are predisposed to aspire for things that are idealistic and unattainable (Werner 2002a:354). In the light of the irrationality of people, the rational-economic assumption advocates that an attempt be made to prevent irrational emotions from interfering with the work people do. School managers are equally challenged to understand that educators cannot separate their emotions from their work, and as Lewis and Roets (2002:204) put it:

... accordingly, the way in which an individual attributes meaning to a particular event and comes to terms with it occasions the manifestation of stress in that individual...

Just as Lewis and Roets contend that there is a link between an individual and work, Dawson (1993) contends that if people are to be productive in their work, they should not be expected to separate their emotions from the physical production of commodities. It is apparent that Schein's rational-economic assumptions overlook the cause-effect dimension in productive systems where the

adage is 'a happy employee is a productive employee' (Dawson 1993). The preceding discussion has relevance for school managers since the success of learners should also be credited to educators' mental health, commitment and dedication.

The separation of emotion from productive labour leads to what Karl Marx regarded as alienated employees (Van der Merwe 1992). Covey (1989:58) thus cautions against alienated labour when he states that production capability [PC] is always to treat your employees exactly as you want them to treat your best customer. It is acknowledged that school managers should assist educators to understand the school's expectation from them in order that they work towards the satisfaction of such expectations. Nevertheless, one should not assume that having a 'buy-in' in the school's vision and expectations would be automatic; it is a process that needs time and explanations. Investment of time and energy on educators' understanding of the school's vision is necessary since working together towards a common goal and purpose would be enhanced. Surely, the employees' state of mind is critical for enhancing productivity in organisation, and the fact that most educators are demotivated is indicative of alienation. Covey (1989: 58) thus states that:

... You can buy a person's hand, but you cannot buy his heart. His heart is where his enthusiasm, his loyalty is. You can buy his back, but you cannot buy his brain. That is where his creativity is, his ingenuity, his resourcefulness...

In view of what Covey states in the preceding paragraph, Schein also contributed to the eminence of the social assumption theory to address the limitations of the rational-economic assumptions.

The following discussion focuses on social theorists and the development of the concept 'leadership'.

### 2.2.1.5 Social theorists and the development of the concept 'leadership'

Werner (2002b) concedes that Mayo<sup>3</sup> and his associates concluded that industrial life had taken the meaning out of work thereby frustrating employees' social needs. In parallel disposition, social theorists postulate that people are motivated by social needs and they acquire their basic identity in relationship with others (Dawson 1993). When people's needs are in sync with the degree to which these needs are gratified (Mabale 2004), they will be acquiescent to productive tendencies than when the needs are ungratified. The issue of educators' motivation is located on the systematic involvement of educators in activities aimed at school development as expected in a knowledge-driven and knowledge-dependent society (Le Grange 2002:68). According to McKay (1995:281) achieving educational goals is not enough since a leader is expected to build good human relations with staff and pupils, both as individuals and as members of a work group. The researcher is of the opinion that balancing of industrial life and activities with the social needs and expectations of employees is necessary in all production systems.




Mwamwenda (1995) gives a psychological explanation of employee motivation when he concludes that Maslow's hierarchy of needs provides a global picture of how needs satisfaction shows a relationship with people's levels of motivation. Ipso facto, congruence and harmony between the individual's longings for social companionship and intimate relationships with other human beings (Werner 2002b), and engagement in meaningful productive activities should be sought at all times. On a more global context, Peck and Tichell (1998) contend that interpersonal relations and a sense of 'belonging' are necessary for macro-economic and political governance structures to be compatible with sustained growth and development.

From the preceding discussion it can be deduced that a motivated staff is necessary for effective attainment of a school goals. In parallel disposition, a demotivated staff is not only a liability, but it is also a hindrance to attainment of the school's operational and strategic objectives. To this effect, Mathibe (1998) notes that educators are responsible for the production of the intellectual capital of a country, and therefore their motivation should be sought after at all costs. Covey (1989) also indicates the centrality of employees to organisational development when he states that:

... PC work is treating employees as volunteers just as you treat customers as volunteers, because that is what they are. They volunteer the best part – their hearts and minds...

Employees are the most important resource that an organisation has, and the satisfaction of employees' needs should rank highest in managers' everyday work. Table 2.3, adapted from du Preez, Campher, Grobler, Looock and Shaba (2003), presents a comparison of Maslow and Herzberg's theories on motivation.

Table 2.3: Comparison of Maslow and Herzberg's theories on motivation

HERZBERG'S MOTIVATION	MASLOW'S HIERARCHY OF NEEDS
<ul style="list-style-type: none"> <li>• Achievement</li> <li>• Task</li> <li>• Responsibility</li> <li>• Growth</li> </ul>	<ul style="list-style-type: none"> <li>• Self-actualisation</li> </ul> 
<ul style="list-style-type: none"> <li>• Achievement</li> <li>• Recognition</li> </ul>	<ul style="list-style-type: none"> <li>• Ego</li> </ul> 
<ul style="list-style-type: none"> <li>• Supervision</li> <li>• Interpersonal relations with peers and supervisors</li> <li>• Status</li> </ul>	<ul style="list-style-type: none"> <li>• Social</li> </ul> 
<ul style="list-style-type: none"> <li>• Job security</li> <li>• Working conditions</li> </ul>	<ul style="list-style-type: none"> <li>• Safety</li> </ul>

<sup>3</sup> Social theorists became more active after the results of the Hawthorne experiments were published by Elton Mayo.

From the preceding Table 2.3 du Preez et al. regard needs from the first and second levels as deficiency needs while needs from level three to five are growth needs. However, the fragmentation of human needs [and treating them as unrelated entities in human motivation] as well as specialisation of functions in schools may stunt educators' development and satisfaction of growth needs (Mathibe 1998). For example, Schein (1980:68) cautions that fragmentation and specialisation of labour in modern labour markets leads to loss of meaning of work since employees are exposed to hierarchical structures that restrict the need for self-actualisation. The idea here is that when educators are restricted to use their capacities and initiative they may become despondent since they do not perceive the relationship between the mission of the school and their interests (Davis & Wilson 2003).

It is an unassailable fact that all human beings need a sense of meaning and accomplishment in their work, and Werner (2002a:355) contends that people strive towards maturity in their work since they experience growth in the context of their work. People are complex and therefore it is necessary to acknowledge differences in human beings due to their complex nature (Davis & Wilson 2003). For example, human beings have different talents and potentials, and as a result it is difficult to aggregate their needs, potentials and limitations. In the light of the preceding statement Werner (2002a:355) lists the following characteristics of the people:

- people are complex and highly changeable;
- needs are not constant and they may change from one situation to the next; and
- people may productively join in the activities of an organisation to satisfy different needs.

From Werner's epitomisation of people it may be construed that people are neither constant nor predictable. For this reason, while the assumptions of social



way that human factors play no part in determining production. Production in this type of leadership style is achieved by means of formal authority, and subordinates are controlled through enforcing submissiveness (Werner 2002a:356). In the light of the preceding statement the authority-compliance approach manager is an autocratic leader, and decision-making is centralised, while communication is top-down (Boje 2003).

On the other hand, a country club manager seems to be democratic in approach and also shows less concern for production [scale point 1] and maximum concern for people [scale point 9] (Werner 2002a:356). In a country club approach thoughtful attention is given to needs of people, and even if this practice results in a relaxed and friendly atmosphere in an organisation, it may create an easy-going tempo towards work. According to Van der Westhuizen (1999), cultivating and maintaining sound interpersonal relationships is of primary concern for a country club manager since it is assumed that when interpersonal relationships are harmonious job performance would automatically be improved.

Blake and Mouton's grid provide a description of an impoverished school manager who is located at a 1.1 scale and rightly so, an impoverished school manager has a *laissez-faire* approach (Werner 2002a:356). An impoverished leadership style indicates that one in management makes the minimum effort to get the work done and yet remains a member of the organisation. According to Blake and Mouton (1999), an impoverished manager shows little concern for production and little concern for people, both at scale point 1. In schools, such managers avoid decision-making and they are emotionally withdrawn from their work and the schools. On the other hand, a middle-of-the-road manager attempts to maintain a balance between production and interpersonal relationships, and Blake and Mouton (1999) describe this style as the 'go-along-get-along'. In a 5.5 leadership style, sufficient achievements by the organisation are possible because the need to complete work is balanced by keeping people's morale at a satisfactory level. It is noted that the middle-of-the-road manager conforms to the

status quo and does not attempt to assert his or her power over subordinates (Van der Westhuizen 1999).

In direct contrast, Blake and Mouton (1999) present a team-orientated manager as one falling in the 9.9 leadership style. In a 9.9 leadership style, completion of tasks is effected through people's involvement, mutual dependence and 'communal share' relationships of mutual trust and respect. The team-orientated manager integrates concern for production and concern for people at a high level, both at scale point 9 (Werner 2002a:357). Blake and Mouton (1999) note that a team-orientated manager encourages teamwork, is goal orientated and strives for excellent results through participative management and leadership, involvement with people and conflict management. From the preceding discussion it can be concluded that Blake and Mouton's leadership theory suggests that leadership can be seen as a personality trait with which a school manager creatively stimulates, directs and coordinates group interaction for the effective of an institution. The gaps found in the behaviouristic approach to leadership resulted in the adoption of a situational approach to leadership.

#### 2.2.1.6 The situationalists and the development of leadership

Allais (1995) notes that the situational approach is one of the more widely accepted theories of leadership characteristics. Tannenbaum and Schmidt, as cited in Werner (2002a:358), are of the opinion that there is a link between the school manager and the situation prevalent in institutions of learning. Tannenbaum and Schmidt's three-factor theory advocates a leadership continuum that illustrates the influence of situational factors on variations in the nature of leadership (Falikowski 2002:2). The leadership continuum illustrates that leadership styles vary according to the distribution of influence among school managers and their subordinates, and it is typified by four main styles of leadership that Werner (2002a:358) lists as tells, sells, consults and joins.

In tells leadership style the school manager identifies a goal, decides on how the goal is to be attained and instructs educators towards attainment of organisational objectives without providing an opportunity for participation in collective decision-making (Werner 2002a:358). In the same vein, Werner (2002a:358) notes that in the sells leadership style the school manager still decides what would be done and how it would be done, but expects resistance and therefore prevails upon educators on the validity of the decision. In symmetry, the sells approach has some affinity with transactional leadership since in both approaches subordinates are solicited to cohere with what the school manager covets. Tannenbaum and Schmidt present the consult leadership style as the one in which the school manager chooses the decision only after the views and contributions of educators are considered (Werner 2002a:358). Consultation per se, implies commonality of views generated by open communication and joint decision-making. Subsequently, Van Clieaf (1985) notes that in the give-and-take situation implied by consultation there is dialogue that leads to a new understanding between the manager and subordinates.

However, it appears that the most appropriate leadership style is the one in which the school manager joins subordinates in the carrying out of duties. According to Werner (2002a:358), the joins leadership style implies that the manager defines a problem and the parameters of the decision and leaves the decision to the group. In the system where the joins approach is implemented the school manager acts as a group member and does not see leadership as being dissociated with the real situation or shop floor (Falikowski 2002:2). The joins approach to leadership also extends the relationship of trust between managers and subordinates. To this end, Stodgill (1981:73-74) concludes that:

... the leader is characterised by a strong drive for responsibility and task completion, vigour and persistence in pursuit of goals, venturesomeness and originality in problem solving, drive to exercise initiative in social situations, self-confidence and sense of personal identity, willingness to accept consequences of decisions taken, willingness to tolerate frustration

and delay, and capacity to structure interaction systems to the purposes at hand.

Stodgill's characterisation of a leader or manager highlights the need for consistency, accountability, creativity and inventiveness. In the same vein, McKay and Romm (1992:281) contends that achieving educational goals is not enough since leaders are expected to build good human relations with staff and learners. As it appears, effective human relations also depend on a concern for ethical values (Falikowski 2002). Against the background of the preceding statement Covey (1989) notes that PC work is treating employees since they volunteer the best part – their hearts and mind for organisational success. Surely, leaders should always attempt to ensure that subordinates are prepared to go an extra mile for the organisation, and this calls for attainment of a balance between their aspirations and the vision and mission of the organisation. In this context, it is significant to note the following three types of influences of each of the leadership approaches and styles as indicated in Table 2.4.

Table 2.4: Influences which determine a leadership style

Influences in a school manager	Influences in subordinates	Influences in the situation
Personality	Need for independence	Type of school
Background	Accepting responsibility	Group effectiveness
Value system	Interested in problem-solving	Complexity of the problem
Respect Subordinates	Understanding goals of the schools	Time pressure
Leadership philosophy	Sharing in decision-making	Common purpose

Adapted from Werner (2002a:358-359).

Table 2.6 indicates that synergy should be maintained between influences in the school manager, influences in subordinates and influences in the situation in order to maintain and sustain harmonious relationships in the workplace (Falikowski

2002). Just as Tannenbaum and Schmidt's leadership model has some similarities with Hersey and Blanchard's situational leadership model, it is based on the maturity and readiness of employees to take responsible decisions in the workplace (Dawson 1993). Accordingly, Hersey and Blanchard (1988) note that task behaviour implies the degree to which school managers are likely to organise and spell out the task of the group members by indicating who would do what, when, where, and how. Seemingly, task behaviour is characterised by a manager's ability to institute well-defined patterns, channels of communication and procedures for execution of tasks (Falikowski 2002).

The researcher observes that leadership is exercised when specific task objectives or goals are to be accomplished. Indubitably, traits such as the need for achievement, desire for responsibility, task orientation and task-relevant knowledge are needed (Hoy & Miskel 1991:287). Figure 2.4 provides a summary of situational leadership.

Figure 2.4 Hersey and Blanchard's situational leadership theory

High-relationship and low task  S4			High-relationship and high-task  S2
	low-task and high-relationship  S3	high-task and low-relationship  S1	
Q4  Low		Task behaviour	Q1  High

From Figure 2.4 it appears that Hersey and Blanchard (1988) are of the opinion that S1 is linked to telling since the school manager explains by means of task behaviour to subordinates what to do, how to do it, where and when to do it. In the

S1 there is a high-task behaviour and low relationship, and Werner (2002a:360) notes that communication is mainly top-down. Furthermore, Werner (2002a:360) contends that the S2 relationship is related to selling. Typically, the S2 relationship has a high-task behaviour and high-relationship leadership style. In the S2 relationship the school manager provides guidance to subordinates and one expects that there would be two-way communication and socio-emotional support to subordinates to accept management decisions.

S3 leadership is linked to participating and in this approach there is a high-relationship and low-task behaviour (Werner 2002a:360). According to Falikowski (2002), in a participatory environment the school manager and subordinates take decisions collaboratively and there is an emphasis on two-way communication. It is concluded that subordinates may participate in decision-making if they have the required capacity and abilities for decision-making. Werner (2002a:360) is of the opinion that the S4 relationship is related to delegating. Evidently, the leadership style classified as S4 is characterised by high relationship behaviour and low task behaviour. Delegation requires that subordinates be allowed to take independent decisions in relation to tasks they are delegated and thus, supervision by the school manager or school manager is of a general nature.

From the preceding discussion it can be deduced that as subordinates gain skills, experience and knowledge they need to be given more responsibilities to fulfil. Similarly, Falikowski (2002) notes that the school manager should determine the level of maturity of subordinate before delegating responsibilities, tasks and duties. Werner (2002a:362) notes that since subordinates do not have a fixed maturity level, for effective job advancement, promotions and entry to new roles in schools, educators should be taken through the preceding four leadership styles. Inasmuch as there are many leadership approaches and theories, in recent years

two leadership practices, namely transactional and transformational leadership have come to dominate debates on leadership in schools.

#### 2.2.1.7 Transactional leadership

According to The Pocket Oxford Dictionary (1996, sv 'transaction') the concept 'transaction' refers to 'commercial business done; transacting of business'. It would appear that the concept transaction is borrowed from the commercial and business fields where trade-offs are prevalent. A transaction occurs between two parties, the seller or trader and the purchaser or client (Robinson 1992). When this relationship is translated to the work situation the trader is the school manager and the purchaser or client is the learner or public in need of access to education. Typical of employment relations, transactions such as payment for services rendered occur between employers [providers of employment and reward] and educators [service providers] and thus, rewards in the form of salaries and wages are offered to educators for services they render in schools (Dawson 1993).

According to Robinson (1992), the link between transactional leadership and the Stimulus-Response [S-R] theories is evident from the fact that incentives [in the form of a reward, salary, award etcetera] reproduce the repetition of desired responses such as productivity and commitment to a school's vision and goals. Transactional leadership is inter alia intended to maintain and sustain a balance between employee productivity and the school manager's authority (Robbins 1997). In most transactional relationships the power and authority of school managers are absolute and incontestable. As a result, those who play the production game get the kudos and prizes while those who are distinguished not to be productive and competitive are pushed, sometimes gently, but always firmly out of the system (De Villiers 1980).

Evidently, transactional leaders use their power and authority to reward hard-working subordinates and punish recalcitrant ones. Robinson (1992) notes that transactional leadership consolidates the power of bureaucrats and consolidates centralised decision-making. School managers who use a transactional approach would see themselves as being responsible for 'policing' educators who seem not to be 'towing the line'. According to Mwosa (1987:111), anyone drawing up a list of bureaucracy's greatest inconveniences would undoubtedly put inertia and routinisation somewhere near the top of transactional relationships. Transactional leadership, just like a bureaucracy, locks decision-making processes and authority within a hierarchical structure, thereby creating a regimented structure within a school in that there is an appropriate place for each employee. For this reason, Blair (1999:17-18) provides the following description of transactional relationship:

- a leader communicates and subordinates listen;
- a leader stimulates the group into activity to achieve goals within the group's interests and ideals;
- a leader fills a certain role and status; and
- a leader creates and stimulates responsible action on the part of the followers.

From Blair's view it would appear that attaching power to titles and status – as in transactional leadership – links rewards to command so that those who are in leadership positions reward subordinates for the work they do. Transactional leadership reproduces itself since educators become motivated to gravitate for 'top' jobs and for the power in order that they too reward subordinates (Cucullu 1998). Storey (1992) also notes that transactional leadership encourages the precision with which employees are shaped into identical sets of replaceable units to fit similar sets of organisational roles. Surely, transactional leadership has its own advantages and disadvantages, and the onus rests with managers not to over-depend on it. For example, just as it is good and appropriate to reward employees

for hard work and diligence, there is a danger that employees would be more inclined towards extrinsic motivation than intrinsic motivation.

In reaction to transactional leadership, and in the spirit of democratisation, some schools of thought opted for transformational leadership.

#### 2.2.1.8 Transformational leadership

The Pocket Oxford Dictionary (1996, sv 'transform') defines the concept 'transform' as to 'make a thorough or dramatic change in form, appearance, character etcetera.' In its simplistic form, the concept transformation refers to changes instituted to improve the shape and structure of organisations. The noun transformation is drawn from the verb transform and it may denote the changes that are instituted in organisations. Transformational leadership refers to ensuring and enhancing changes and transformation in an institution. According to Dawson (1993), change is part-and-parcel of life, and transformational leadership depends on the extent to which school managers may manage to keep their institution up-to-date with changes in the broader society. For this reason, transformational leadership is appraised by many education-planners as the best approach for taking schools into the twenty first century (Fullan 1991). For example, with transformational leadership the school manager would work with other stakeholders to obtain transformation of undesirable aspects of schooling.

It is noted that transformational leadership involves advocacy, inter-group relations, team building and inspiration without domination. In the context of transformational leadership, the school manager uses his or her power as a means of empowerment for all stakeholders (Sono 2002b). Seemingly, transformational leadership stimulates, directs and co-ordinates group and individuals to attain school goals. However, just as school goals change, a change in the culture of schools is inevitable, and Hoy and Miskel (1991:206) note that new social

structures nurture new group values. It is evident that transformational leadership nurtures emergence of new practices within schools and departments or subject groups. In such subject groups, power does not reside in an individual, but it is also shared equally by group members (Mathibe 1998). Table 2.5 provides a synopsis of differences between transformational and transactional leadership.

**Table 2.5 Differences between transformational and transactional leadership**

Transformational leadership	Transactional leadership
<b>Empowers</b>	<b>Bargains</b>
<b>Inspires vision and ideas</b>	<b>Is task orientated</b>
<b>Mixes home and work</b>	<b>Separates home and work</b>
<b>Has a long-term focus</b>	<b>Has a short-term focus</b>
<b>Challenges</b>	<b>Coaches sheltered learning</b>
<b>Rewards informally, personally</b>	<b>Rewards formally</b>
<b>Is emotional, turbulent</b>	<b>Is comfortable, orderly</b>
<b>Simplifies</b>	<b>Complicates</b>

Adapted from Dawson (1993:109).

From Table 2.8 it appears that Dawson is of the view that a transformational leader would create structures in order to accomplish organisational goals without trying to be the hero in the organisation.

#### 2.2.1.9 Summary

From the discussion on leadership it would appear that the concept leadership refers to an activity aimed at motivating and directing people to work enthusiastically towards the attainment of an organisation's vision. The following points were contemplated in the discussion:

- Leadership is an activity which gives rise to proactive, visible conduct characteristic of interpersonal relations in pursuing certain objectives by influencing subordinates;
- The trait approach presents leadership from the perspective of an individual's personal characteristics;

- The functional approach is based on the premise that a leader cannot achieve anything in isolation;
- Behaviouristic theorists advocate an investigation into behaviour projected by effective leaders for an understanding of the concept leadership;
- Social theorists postulate that people are motivated by social needs and they acquire their basic identity in relationship with others;
- There is a link between the school manager and the situation prevalent in institutions of learning;
- Typical of employment relations, transactions such as payment for services rendered occur between employers [providers of employment and reward] and employees [service providers];
- Change is part-and-parcel of life, and
- Transformational leadership depends on the extent to which school managers may manage to keep their institution up-to-date with changes in the broader society.

Since the conceptualisation of leadership has been addressed, the following discussion would focus on conceptualisation of the term 'management'.

### 2.2.2 What is management?

The practice of management may be traced over a period of thousands of years, and to this effect Wren (1984) notes that Egyptians applied management functions of planning, organising and controlling when they constructed the pyramids. Nevertheless, the study of management gained ground in the twentieth century, and business schools have mushroomed in recent years as more students are seeking degrees in business and management. Van der Westhuizen (1999) notes that management is more intellectual in approach since it has more of a connotation of being a rational process that is related to intellectual activity and it is typified by words such as efficiency, effectiveness, planning, procedures,

control and consistency (Gerber et al. 2000). In addition, Sedunov (2002:3) notes that management may be influenced by goals:

- To provide managerial methods and techniques to control the contradictory systems of development;
- To supply learners with methodologies of complex opposing systems analysis; and
- To provide the basis for synthesis of a management meta-system that is capable of converting contradictions into a civilised synergetic cooperation.

Surely, for Sedunov management is related to maintenance of order, systems, and traditions such as 'what worked yesterday should work effectively tomorrow', stability and security. For this reason, Kotter (1990a) contends that management is more scientific than leadership, and it relies on universal skills such as planning, budgeting and controlling. Furthermore, management is concerned about organisational development and progress as well as goal attainment (Hoy & Miskel 1991:198). On the other hand, Walton (1985) relates management to factors that are intended to improve quality of work life [QWL] such as:

- Fair compensation: paying a living wage;
- Safety and health: elimination of hazards in the workplace;
- Self-development: empowerment;
- Growth and security: training to avert skill obsolescence;
- Social integration: encouragement and openness;
- Constitutionalism: workers' rights and respect for labour laws;
- Life space: minimise the impact of work on family life; and
- Social relevance: high ethics and acting responsibly with respect to products, marketing etcetera.

From the preceding discussion it may be construed that Walton views management as being essential for employee growth and development: both as

employees and human beings in their own right. The definition of management, in this study, thus refers to:

- A discipline when reference is made about future changes in schools;
- A profession when referring to a manager's influence in a school; and
- As a function when reference is made to decision-making; production processes and conflict resolution in schools.

Characteristically, Figure 2.5 depicts an integrative framework of the development of management that would be discussed in this study.

Figure 2.5: A Framework of the development of Management Theories

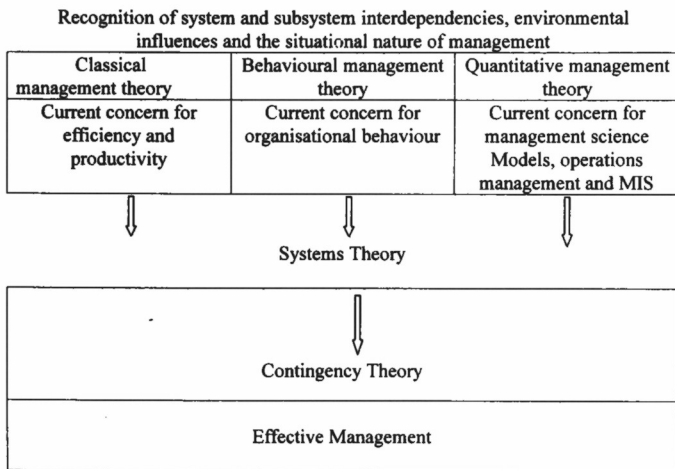


Figure 2.5 provides a synopsis of epochal changes in management approaches and theories. However, management per se is based on an assumption that the manager may make use of all valid tools, techniques, concepts and theories to

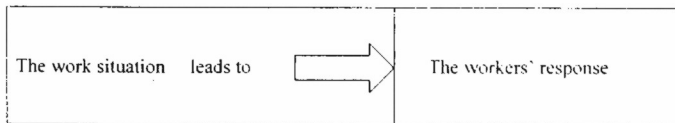
ensure high profits and returns in an organisation (Van der Westhuizen 1999). In parallel disposition, Covey (1989) states that management is about doing things in a right way, and consequently one may conclude that over the years different approaches have been used to ensure productivity in organisations.

The following discussion focuses on some of the prominent approaches and theories of management.

#### 2.2.2.1 The Classical-scientific management approach

According to Dawson (1993:6), the classical-scientific approach to management aims at establishment of order and rationality within schools. In the light of the preceding assertion, Dawson seems to suggest that the duty of the school manager is to create order, rationality and direction in a situation in which otherwise there would be chaos and lack of direction. For the record, in this study Taylor and Fayol were selected as exponents of the classical-scientific approach to management, and Figure 2.6 presents a synopsis of the scientific management perspective on work.

Figure 2.6: Synopsis of the scientific management approach on work



From the preceding Figure 2.6 it may be deduced that the classical-scientific approach is based on the workers' responses to the work situation. One of the exponents of scientific management, Frederick Taylor, trained as an engineer and he tried to apply his management approach in areas where he worked. The following discussion should indicate that Taylor was in favour of a technicist system of management in which decision-making roles and responsibilities were

located within a particular level in the occupational ladder (Mathibe 1998). This, according to Van der Westhuizen (1999:65), influenced Taylor to think that employees could be programmed like machines to carry out tasks effectively.

Taylorism is based on the notion that effective training and work methods are necessary for effectiveness of employees (Van der Westhuizen 1999). This assumption is derived from Taylor's premise that organisational effectiveness depends on expertise, getting the 'right man or woman for the right job', and specialised training for educators. In this respect, Taylor as cited in Van der Westhuizen (1999:66), formulated four basic management principles in organisations namely:

- everyone's work should be clearly described and defined;
- the choice, training and placement of employees should be scientifically based;
- there should be cooperation between managers and subordinates to ensure that work is done effectively; and
- managers and subordinates should have their responsibilities and there should be a distinction in their responsibilities.

It appears that Taylor's view was that 'managers should manage and workers should work'. Van der Westhuizen (1999:65) notes that Taylor acknowledged that in industries where he conducted his researches both managers and subordinates were unsure of their mutual responsibilities. To resolve that situation, Taylor advocated that managers and subordinates be trained to fulfil their particular roles effectively (Van der Westhuizen 1999:65). According to Hoy and Miskel (1987), the preceding statement is related to the creation of a bureaucracy in which structures and policies are distributed in a fixed order as official duties. Here one may conclude that Taylorism presupposes that efficacy results from division of labour and functional specialisation.

Van der Westhuizen (1999:67) is of the opinion that while Taylor sited prominence on the role of the employees in organisations, Fayol positioned emphasis on the role of top management and leadership. Fayol believed that managers should possess technical skills to inspire and motivate subordinates to be effective in their work (Van der Westhuizen 1999). Significantly, Fayol's research on management was conducted in the French Armed Forces, and thus his theories took root in the special culture of the military environment (Dawson 1993:6). From the preceding statement, it may be construed that Dawson infers that Fayol's conception of management and administration is associated to well-organised and unqualified discipline one would expect in the army and during military operations.

Against the background of the preceding discussion Dawson (1993) notes that just as it is a universal procedure to have contingents in the army, Fayol advocated division of work into departments or units of functional specialisms. In parallel disposition, in education systems separate departments are created to fulfil particular functions such as the Finance Department to deal with financial matters, the Research and Development Department to assume responsibilities for research and development and the Marketing Department to execute marketing responsibilities (Dawson 1993:6). Accordingly, Van der Westhuizen (1999:68) notes that the division of work takes place at both management and employee level since in schools there is 'a place for every person and every person would be at his or her place'. Management in this case is aimed at ensuring that employees at each level of the occupational structure fulfil their roles effectively (Van der Westhuizen 1999).

Dawson (1993:6) contends that Fayol recommended a clear definition of levels and areas of responsibility to eliminate uncertainty in organisations. Fayol also noted that effective organisational management requires an authority structure

through which commands are given and instructions are followed (Van der Westhuizen 1999:68). Within such authority structures school managers may secure obedience from subordinates by treating them fairly and with kindness. According to Van der Westhuizen (1999:68), fairness and justice are strategies for ensuring unity of command and unity of purpose in a school. In organisations principles of fairness and justice demand that objectives of organisations be clearly defined in order that participants understand the expectations and standards against which their work performance would be assessed. In the same vein Dawson (1993:7) notes that senior management should provide direction to the school, and also capacitate educators to set realistic benchmarks for themselves within the framework and parameters of legitimate structures in the school.

Fayol also emphasised that communication be achieved through vertical structures (Dawson 1993:7) and consequently, little attention was given to lateral communication. It would appear that Fayol assumed that communication by management was necessary for establishing powerful and permanent procedures in order that an esprit de corps was developed and fostered in an organisation (Van der Westhuizen 1993:69). It is acknowledged that the role of management in this context is to communicate organisational goals and procedures to strengthen group cohesion and organisational effectiveness. Communication per se, is essential in schools since there are a number of functions to be performed, and each department should implement organisational objectives, strategies and programmes of action [and action plans]. Hoy and Miskel (1987) note that Fayol proposed a hierarchical management structure of authority in organisations, thereby consolidating a hierarchically arranged labour system as in a bureaucracy.

The classical-scientific management approach generates a well-established system of super-ordination and subordination that may lead to fragmentation of human relations in the workplace. Van der Westhuizen (1999) notes that fragmentation of

human relations may not be conducive in the school situation and consequently, the human relations approach to management may seem more favourable for organisations such as schools.

### 2.2.2.2 The Human Relations Approach to management

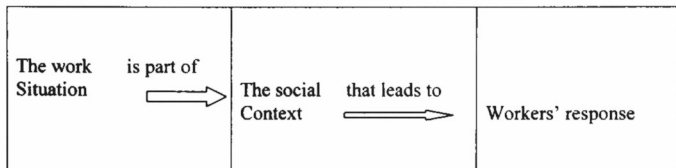
According to Van der Westhuizen (1999:72), the human relations approach commenced from shortcomings and limitations of management approaches that neglected human beings and their social needs. The human relations approach is based on the assumption that human beings are an essential resource in organisations, and utilisation of this resource appropriately adds value to the organisation's profile (Mabale 2004). Dawson (1993:9) notes that the need of managers to obtain cooperation of subordinates highlights the importance of reconciling organisational and human needs and aspirations. Similarly, Covey (1989:) states that it is incredibly easy to get in an activity trap of climbing the ladder only to discover that it is leaning against the wrong wall. Seemingly, Covey accedes to the fact that it is possible to be very busy without being effective, and to correct this situation there is a synergy between organisational life and employees' lives. Figure 2.7, as adapted from Van Dyk (2002), indicates the dynamics of organisation-individual interaction.

Figure 2.7: The dynamics of organisation-individual interaction



From Figure 2.7 it may be deduced that both the organisation and the individual represent a tapping of common resources. In the light of the dynamics of organisation-individual interaction, Dawson (1993:10) notes that motivation and cooperation are a result of organisational guarantee of satisfaction of individual needs. As a result, harmonious working relations should be nurtured and cultivated if organisations are to grow and develop. In addition, managers should acknowledge the primacy of satisfaction of human needs in order to have their loyalty and commitment to organisational objectives (Mabale 2004). For this reason, Figure 2.8 presents a synopsis of the human relations perspective on work.

Figure 2.8: The human relations perspective on the work situation



In the light of Figure 2.7 it is apparent that the work situation is intractably linked to the employees' social context. Mabale (2004) is of the opinion that productivity is increased when healthy group relations exist between organisational objectives and aspirations of educators. The human relations approach acknowledges that social motivation is often better than monetary motivation (Hoy & Miskel 1991:11; Van der Westhuizen (1999:73). Surely, the satisfaction of human needs precedes over monetary gains and hedonistic intentions, and Maslow's theory of social motivation seems to be interlinked to the human relations approach to management since it propounds that motivation is linked to satisfaction of a person's needs. In the light of the preceding statement Van der Westhuizen (1999:195) notes that just as the quest for satisfaction of needs does not diminish when these needs are met and consequently, school managers should always attempt to ensure that educators' motivation is sustained.

On the other hand, Robinson (1992) observes that people want to be secured, to be in control, to seek meaning in the work they do, and to be in winning teams rather than the ones that are losing. Robinson's assertion links well with a typical humanist argument that human beings are creative beings who seek fulfilment in life. Sustaining the argument for a human relations approach to management and leadership, Van Dyk (2002:25-26) states that:

- individuals have expectations and needs in life, particularly with regard to careers;
- individuals may only meet their expectations and needs by joining organisations where they receive an income and are afforded to meet career expectations or to satisfy their needs;
- individuals translate their expectations into personal goals before they join the organisations;
- the job context environment is the task environment within which an individual functions and it includes personnel policies, work conditions, service benefits, career planning and quality of work;
- the external environment represents factors outside organisations that affect personal functioning and it includes technological acceleration, the effect of social and other groups outside the work environment; and
- individuals constantly compare personal progress with personal achievement in organisations.

Just as Van Dyk suggests that employees have personal goals, Van der Westhuizen (1999:67) contends that school managers should be capacitated to create environments in which educators grow and develop. It is an undisputed fact that human life is dynamic, and consequently change is endemic and inevitable in all spheres of life since there is a need for progress and self-actualisation. Nevertheless, the quest for progress and self-actualisation yields other developmental challenges and changes, and consequently embracing change may

have a negative impact on people. For example, change has a tendency of threatening people's need for security (Robinson 1992:178). Change threatens people's everyday life, and Moloi (1998:34) notes that a sense of loss, whether felt or imagined, may lead to resistance to changes in schools.

Moloi (1998:34) notes that changes in schools may be typified by knowledge and skills obsolescence and thus an employee who used to be regarded as the most knowledgeable and or most skilled may at one point or another be regarded as being in possession of obsolete and redundant skills or knowledge. It suffices to state that when this happens an employee may feel betrayed by the school for which she or he has worked for with distinction and loyalty. Typically, an employee who feels let down by the employer becomes despondent, demotivated and vain (Dawson 1993). According to Robinson (1992), any change that creates the feeling that certain positions would be eliminated and educators would be laid off or demoted to lesser jobs, would probably meet resistance. In line with the human relations theory, and taking cue from Maslow's acceptance and love needs,

Dawson (1993:65) notes that in all circumstances every employee needs to be accepted as a valued member of a social grouping. For example, within a community of peers a person is regarded as a valued, irreplaceable and indispensable member of a group (Dawson 1993:65). Against the background of the fore-going discussion one may conclude that change may erode the confidence of employees. Acceptance and appreciation of an individual's value do not only give an employee a feeling of security, while change erodes one's confidence within a community of peers. It is necessary for managers to assist subordinates to deal with change effectively. Mabale (2004) contends that educators be assisted to endure changes in order to circumvent frustration, despondency, apathy and depression that characterise sudden changes in the workplace. Nevertheless, Maslow as cited in Van der Westhuizen (1999) contends that self-actualisation

needs provide sufficient ground for development of educators' latent talents and abilities in order to prepare them to face these changes with an open mind.

It should be borne in mind that human potential is immeasurable and consequently, opportunities should be created to enable educators to explore the areas they have not yet ventured into (Van der Westhuizen 2002). This is not only viewed as a necessity to skirt the indifference typified by failing to deal with prompt and unexpected changes in the workplace, but also to buttress the discipline and character of the workforce (Sono 2002b). In addition, Robinson (1992:178) cautions that since people respond to challenges that stretch them, it is the task of the school manager to ensure that the challenges do not stretch them completely out of shape. It is also observed that in the school situation educators should be allotted tasks and functions in symmetry with their interests, abilities, knowledge and skills. Opportunities for meaningful dialogue should thus be created to explain and understand expectations in schools. Mwosa (1987:115) provides Table 2.6 to indicate how managers in Western and Japanese organisations relate with their subordinates.

Table 2.6: Management in Western and Japanese organisations

Western organisations	Japanese organisations
Delegation of responsibility; one person is pin-pointed	Consultative decision-making; all are committed to success
Clarity of assignments with job specifications and descriptions	Task to be performed through co-operative efforts
Clearly defined relationship between positions	Individuals work together towards a goal;
Stratified division of labour	Less rigid division of labour and shared responsibilities
Promotion is on merit	Core staff is hired for life [in government and large enterprises]

From the preceding Table 2.6 one may conclude that management in Western and Japanese organisations differ when coming to emphasis in human relations.

Mwosa (1987) notes that emphasis on group work and interdependence retracting from achieving consensus, are crucial factors leading to success in schools. Since the essence of the human relations approach to management has been discussed, focus should now be on the systems approach to management.

#### 2.2.2.3 The systems approach to management

According to Dekker and Van Schalkwyk (1995), schools – both as systems and sub-systems – operate within the confines of the boarder system – society. In the same vein, systems theorists view a system as a set of interdependent elements forming an organised whole (Hoy & Miskel 1991:10). Van Dyk (2002:51) defines a system as being comprised of a number of interdependent components which function as a whole and work together to attain a common goal. The preceding views suggest that components of a system interact with one another in order to attain a common goal or purpose in a school, and Cunningham (1999:29) concludes that a system is a collection of interacting and intertwined systems. The fundamental assumption of the system theory is that the whole is more important than the constituent parts (Mason 1998).

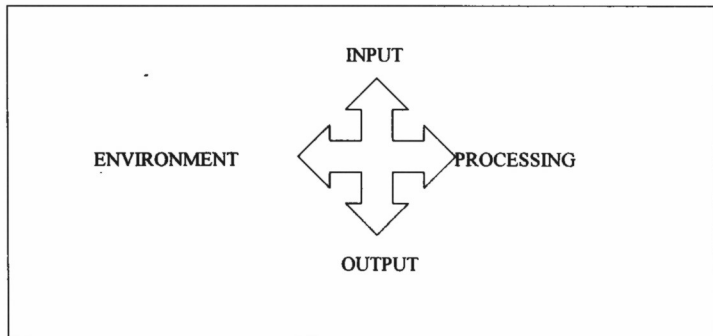
Hoy and Miskel (1991) are of the opinion that systems are dynamic, and there is always a drive for attainment of the state of equilibrium in systems. Typically, the systems approach advances fixed procedures that are interlinked and that follow one another sequentially as in objectives, communication and control in schools (Solomon 1994:64). Systems theorists regard schools as being open or closed systems, and Van der Westhuizen (1999:599) notes that conceptually a closed or open school system may be depicted in terms of the penetrability of the school's boundaries by factors in the environment. For example, the more penetrable the school is, the more open it is to outside influences, and the less penetrable it is, the more closed it is to such influences (Harcombe 2003).

Tichy (1988) is of the opinion that as a result of external threats and opportunities as well as internal strengths and weaknesses of systems, all organisations face challenges. Schools should respond to environmental dictates, and this view is shared with Schein (1980:228) who notes that as open systems schools continuously interact with their environments. In the same vein, Schein (1980:228-229) points to the following about an open system:

- An organisation has multiple goals or functions, and the activities of the sub-systems may not be understood unless these multiple functions and interactions are taken into consideration;
- An organisation consists of a number of sub-systems in a state of dynamic interaction, and
- a description of the functioning of sub-systems is more important than describing individual behaviour.

Notably, systems theory propounds that change in one sub-system should be followed by changes in other sub-systems because the sub-systems in an organisation are interdependent. Figure 2.9, as adapted from Van Dyk (2002), indicates the basic elements of a system.

Figure 2.9: The basic elements of a system



From the preceding Figure 2.9 it may be concluded that a school takes the input from the larger system, processes it, and returns the input to the environment in another form [the output]. Van Dyk (2002:52) notes that a closed system is self-sustaining and independent of external stimuli while open systems require input from the external environment. A system always works towards the maintenance of the state of equilibrium, and Schein (1980) observes that a system is dynamic, and therefore attainment of the state of equilibrium necessitates reciprocated modifications within a system. The implication hereof for school managers is that it is essential to continuously initiate environmental scanning to identify existing threats and opportunities for schools in order to formulate avant-garde educational plans and strategies (Sono 2002a). Ackhoff as cited in Van der Westhuizen (1999), developed the following formula to represent the effectiveness of a school in terms of threats and opportunities that typify the systems approach:

$$P = f(C_i, U_j)$$

where P = achievement of effectiveness

f = function

C<sub>i</sub> = management and leadership control

U<sub>j</sub> = the uncontrollable aspects of the system

A critical analysis of Ackhoff's formula creates an impression that attainment of organisational objectives is ensured through the management and leadership control aspect (C<sub>i</sub>), and its influence on the uncontrollable aspects of the system (U<sub>j</sub>) (Van der Westhuizen 1999:78). Dawson (1993:217) cautions that present-day systems are hostile, consumer needs are too many, competition is extensive, and there is a need for the schools to assume control over the situation. It is noted that just as the school is a system that maintains its boundaries, it experiences social interactions that bind it together with other systems (Massey 1992; Rummler & Brache 1990:55). Massey (1992:29) also notes that boundaries are not simple enclosures that frame and impose a sense of division between institutions; they are necessary for an understanding of uniqueness and particularity of institutions.

It may be deduced that change in one part of the system would resonate to other parts and urge reciprocal changes elsewhere in the system, and the researcher observes that a manager should be capacitated to develop contingencies for effective management in the school.

#### 2.2.2.4 The contingency approach to management

The contingency approach originated from the research undertaken by Victor Storey and Fred Wager on schools and industries in Germany (Boje 2003). According to Dawson (1993:11-12), the contingency approach is based on the premise that the desired design of schools is a product of interrelated factors within particular situations. Van der Westhuizen (1999:80) states that contingency management requires that the manager be able to analyse different situations and to formulate and apply appropriate management strategies that would work best in the relevant situation. Situations differ from organisation to organisation, and from time to time within any given organisation (Boje 2003). As a result, the contingency approach is based on the premise that there is no static design that would suit all schools or all parts of any school at specific or different temporal moments (Dawson 1993:12).

It is noted that there is a link between management contingencies and spatio-temporal factors in schools, and Venter (1987) contends that schools are situated in unrepeatable temporal and spatial moments. The spatio-temporal situatedness of schools implies that they would neither experience development at the same rate nor would they have the same management and leadership styles due to spatio-temporal dictates (Anderson & Kyprianou 1994). As a result, operational strategies in schools should be linked to prevailing circumstances (Venter 1987). Spatio-temporal differences may be linked to the 'tadpole' philosophy that is used to disclose how situatedness determines development and growth as well as the

distinctions between organisations. Taylor (1989:313) portrays the fundamentals of 'tadpole philosophy' when he states:

... consider a pond that spawns a population of frogs. Every year large numbers of eggs are deposited into the pond to produce masses of tadpoles. From these many tadpoles, though, only a limited number of frogs emerge. The tadpole philosophy is then proclaimed by the surviving frogs sitting on their lily pads... each frog asserts to the spirits of its departed brothers and sisters — who never reached frog hood — that if only they had emulated its behaviour, they too could have become frogs...

From Taylor's assertion it may be concluded that organisations develop at different rates. As a result, a school with a stable environment might find centralised decision-making structures more appropriate to its needs while a school that finds itself in an environment of rapid changes would find decentralised decision-making processes more appropriate to its situation (Dawson 1993:12). Van der Westhuizen (1999:81) contends that management and leadership are circumscribed due to environmental limitations and they are situation-bound. For example, while a small school might be better organised through strong centralised control; the larger schools might find decentralised management and leadership structures more appropriate to their effective functioning (Dawson 1993:12).

Van der Westhuizen (1999) notes that adapting management approaches to organisational is essential. For example, a highly complex school requires a reciprocal complex management and leadership structure. Similarly, a school with a more 'educated and skilled workforce' might find that centralised structures are resisted, whereas 'under qualified and unqualified' educators might be more satisfied with centralised management and leadership structures (Dawson 1993:12). In this context, Van der Westhuizen (1999:91) notes that the concept of role-fulfilment involves the behaviour within a school as determined by interpersonal relationships and events. The school manager is inter alia expected to extrude certain behaviours that are contingent to the management and leadership position in relation to the context and content of the school.

The importance of contingencies in education management is linked to directing the school towards attainment of its vision and mission and providing time for reflection (Van der Westhuizen 1999). On the other hand, contingency theorists regard role expectations as fundamental anticipations which one person has of someone else's behaviour within a certain role (Yong & Hoeh 1999:125). For example, the Mintzberg's role approach is one of the approaches that extend the school manager's role beyond the traditional view of planning, organising, leading and controlling to include the management of situational factors within a school. Barth (2003) lists the following management processes as being significant in schools:

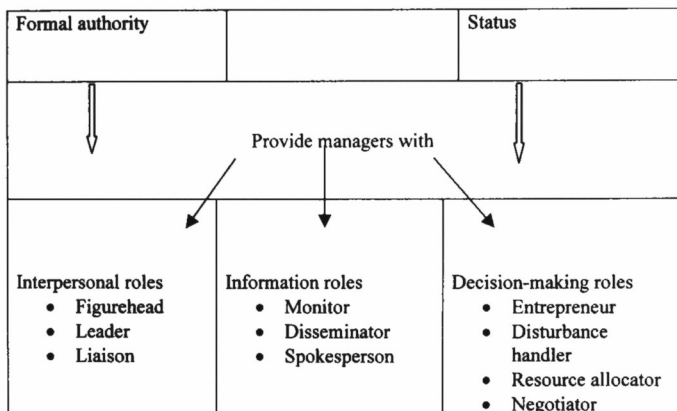
- Accessing: searching for strategies, research and inquiry;
- Evaluating: judgements, confirmation of information, and qualification of data;
- Analysing: critical thinking, sense making;
- Organising: filtering, discarding and filing;
- Conveying: explaining, presenting;
- Collaborating: messaging, sharing studies; and
- Securing: self-discipline, back-up, inoculation and threat awareness.

Just as Barth provides a systemic approach to dealing with the influence of situational factors in management, Lam (2000:490) maintains that explicit knowledge may be acquired, codified and transferred through logical deductions. The structure of a school, and resulting practices in management need alignment with maintenance of stability. Chimaera Consulting (1999:1-2) presents the following points as essential leadership functions:

- Directing and defining roles for 'followers';
- Coaching and seeking ideas from 'followers';
- Supporting and giving 'followers' the right to control their labour; and
- Delegating.

From the presentation of Chimaera Consultant's views on contingency management it can be deduced that school managers should define roles for educators as well as delegate duties appropriately. The following Figure 2.10 presents Mintzberg's role approach to effective school management.

Figure 2.10: Mintzberg's role approach



Adapted from van der Westhuizen (1999)

Figure 2.10 indicates that the school manager is not only responsible for the practical operations of the schools, but also for evoking change and renewal in the school (Werner 2002a). It is noted that the school's success depends on the hard work and cooperation of educators, and consequently getting their commitment remains the greatest challenge for school managers (Chung 1994:34). In addition, Morrison (2002) notes that the authority of the school manager is regarded as being crucial for encouraging and inspiring stakeholders to be actively involved in the activities of the school.

### 2.2.2.5 Summary

The preceding discussion indicated that management requires immersion in the culture and processes in the school situation. The following issues were also reviewed:

- The classical-scientific approach to management aimed at establishment of order and rationality within schools;
- Taylorism acknowledged that efficacy in schools resulted from division of labour and functional specialisation;
- Fayol also noted that effective organisational management required an authority structure through which commands were given and instructions were followed;
- The human relations approach originated from shortcomings and limitations of management approaches that neglected human beings and their social needs;
- The system is dynamic, and therefore attainment of the state of equilibrium necessitates reciprocal modifications within a system; and
- Adaptability of management styles and approaches to organisational requirements is essential since a highly complex school requires a reciprocal complex management and leadership structure.

The preceding discussion on the concept 'management' suggests that the authority of the school manager is regarded as being crucial for encouraging and inspiring stakeholders to be actively involved in the activities of the school.

The following discussion focuses on conceptualisation of the term 'professional development'

### 2.2.3 What is professional development?

According to Reitzug (2002:3), professional development may take different forms such as training, on-site processes, networks and professional development schools. As a human resource manager, a school manager needs to set up mechanisms for nurturing and unfolding of educators' potential in order to enhance effective teaching and learning. For this reason, development and enhancement of educators' potential should relate to the work they are doing of not only nurturing the intellectual potential of learners, but also of moral formation and appropriate humanisation according to national policies and goals. To this end Lenyai (2000:3) appropriately summarises the essential position of an appropriately trained and skilled educator when he states:

... the educator is the keystone in the multiple arch of education... eliminate the finest buildings and the most wisely developed curriculum but leave the learner with an intelligent, cultivated and humane educator and the educational process may continue satisfactorily. Provide all the material necessities without the educator or the wrong kind, and the results would be catastrophic ...

In the preceding quotation Lenyai encapsulates the value of appropriately skilled and trained educators for the provision of quality schooling and education. In the light of the preceding statement it is evident that in a nation that appreciates and esteems the education of its children, educator training and continuing professional development would be highest in the list of national priorities. Terry (1999:28) thus notes that where the necessary skills and knowledge are lacking among educators, school managers need to develop a multiple-strategy approach to enable them to fulfil their roles effectively. Quality in education retracts from effective school management and leadership, and consequently the quest for quality in education necessitates that school managers be up-to-date with developments in the education and training fields. In the same vein, Jones, Clark,

Figg, Howarth and Reid (1989:5) regard programmes for professional development as the oxygen for educators to survive as educated and trained professionals. In general, effective professional development has the following characteristics:

- It is integrated with educational goals to improve education;
- It is guided by a coherent long-term plan;
- It is primarily school-based;
- It is continuous and ongoing, providing follow-up support for further learning; and
- It is evaluated on the basis of its impact (Westchester Institute for Human Services Research 2004:3).

From the foregoing discussion it may be construed that professional development should not be an accidental activity, but it should be an integrated with a school's development plan. The following discussion focuses on a description of forms of professional development.

#### 2.2.3.1 Training

Reitzug (2002:3) contends that training is the traditional and still dominant form of professional development. Typically, typically includes direct instruction, skill demonstration and involves workshops and presentations. In addition, training, involves instruction by an expert or experienced employee on job processes in an organisation (Grobler et al. 2002:323). On the other hand, Higgs and Higgs (1994:43) capture the essence of training as they state that:

... education and training are about the use that people make of their knowledge and skills, their value to them personally in their living and thinking, and they are what the acquisition of knowledge and skills had done to their minds, their attitudes, values, ideas, motives and intentions...

Evidently, training involves imbuing employees with knowledge, skills, values and attitudes to do a particular job effectively and efficiently (Cronje et al.

2004:207). For Hodgkinson (1996:8), other things being equal, organisations should appoint the wisest people to their administrative offices. The essence of training is captured by Greenfield & Ribbins (1993:260) when they state that:

... the ultimate training of a leader would be a kind of philosophical withdrawal to look at the larger issues in fresh perspective... a deeply clinical approach to the training of administrators is needed... our training is disjointed, reflection is separated from action, thinking from doing, praxis from the practical.

The researcher is of the opinion that training should develop sophistication, credibility, know-how, integrity and vision in personnel. In the same vein, Stuart (1988) lists the following points about training aimed at professional development:

- Adults become ready to learn when they recognise a deficiency in their own performance level;
- Adults want learning to be problem-based and leading to the solution of a particular problem facing them as individuals;
- Adults want to be involved as equal participants in planning, carrying out and evaluating learning;
- Adults want to be treated as adults, enjoying mutual respect with the trainer; and
- Adults bring with them to the learning situation their unique:
  - ✓ Motives for wanting to learn;
  - ✓ Previous learning experiences [good and bad];
  - ✓ Learning styles and pace of learning; and
  - ✓ Self-confidence and self-image.

From the discussion of Stuart's views on training and adult learning, it may be construed that andragogy [teaching adults] is completely different from pedagogy [teaching children]. Training thus involves direct instruction, skill demonstration, and Jones et al. (1989:102) lists the following forms of training:

- One-day conferences;

- Single-session activities;
- Short courses over a period of time;
- Formal meetings called and led by subject specialists; and
- Membership of working groups.

Against the background of the preceding discussion it may be deduced that training assists personnel to acquire effective techniques, skills and knowledge to carry out their responsibilities efficaciously. The following discussion focuses on on-site training processes.

#### 2.2.3.2 On-site processes

On-site-processes are embedded in practices at the workplace, and employees or trainees are not transported to training centres far from where they work. Embedded professional development includes processes such as inquiry, discussion, evaluation, consultation, collaboration and problem-solving (Reitzug (2002:3). In schools on-site-training is provided by structures such as subject committees and assessment committees. According to Smith (2001:3), workplace learning is a major contributor to competitiveness of both an individual and an organisation. It is also noted that on-site learning augments flexible delivery mechanisms which ensures:

- Acquisition of skills and knowledge in the midst of action;
- Collective action; and
- An outstanding experience of the learning process itself (Raelin 2000:3).

From the preceding discussion it may be construed that on-site learning is essential for continuous transformation in the school. According to the Westchester Institute for Human Services Research (2004:3), on-site learning processes include joint work that refers to shared responsibility for tasks such as teaching, curriculum writing assessment development, as well as creating

interdependence and cooperation among educators. In addition, through mentoring programmes highly experienced educators guide activities of novice educators. Mentorship programmes are based on the premise that beginners need to be capacitated to deal effectively with challenges in the workplace. For this reason, mentoring and coaching programmes should match novices with veterans, enabling veterans to share their knowledge and expertise with the initiates (Westchester Institute for Human Services Research 2004:3). Furthermore, Grobler et al. (2002:325) are of the opinion that on-site learning processes involve:

- Enlarged and enriched job responsibilities;
- Coaching;
- Mentoring; and
- Committee assignments

On-the-job training is essential for efficiency in schools as it enables educators to contribute to significant improvements in the quality of school life, the quality of teaching, relationship formation and perceptions about work and roles in the school. The following discussion focuses on the significance of networks in schools.

#### 2.2.3.3 Networks

According to Reitzug (2002:3), networks are crews of personnel from across different schools that interact regularly to discuss and share practices around a particular focus. Pernell and Firestone (1996:47) found that networks were effective in assisting educators get learners more actively involved in learning, while Lieberman and Grolnick (1996:8) found networks to have a number of positive effects on educators' professional development. On the other hand, Poell et al. (2000:34) note that the learning network theories [LNT] emphasise learning

processes on the social-organisational dimension. According to the Westchester Institute for Human Services Research (2004:3), networks are characterised by:

- Supportive professional community beyond the school building;
- Being organised around specific subject matter;
- Deepening educators' understanding of content; and
- Diversity, some are national and others are international – such as Carnegie Corporation and Pew Charitable Trusts.

From the preceding discussion it may be deduced that networks ensure intersectoral collaboration amongst specialists. There is a link between networks and professional development schools.

#### 2.2.3.4 Professional Development Schools

The goals of Professional Development Schools [PDS] are met through the active participation of university faculties, practising educators and prospective educators engaging in study groups, curriculum development, peer observation, and through collaborative school-based research (Lieberman & Miller 1992). Reitzug (2002:3) notes that PDS enhances teaching experience and improves professional development of personnel in schools. According to the Westchester Institute for Human Services Research (2004:3), PDS are analogous to teaching hospitals and they are a form of collaboration between K-12 schools and higher education.

An intersectoral approach in the PDS capacitates educators to engage in research in order to identify challenges in the classroom situation, and to select appropriate measures to address these challenges. In addition, PDS exposes educators to diverse ideas and techniques to deal with classroom-based problems and challenges.

### 2.2.3.5 Summary

Some essential points about professional development were provided in the preceding discussion and it is lucid that:

- Professional development should be planned by staff;
- Professional development should be task-specific, focussing on actual needs of staff and schools;
- Time should be made available for staff development;
- Professional development should be flexible in order to allow staff to use what they learn in a variety of ways; and
- Professional development cannot happen in isolation and it should be evaluated continuously.

It is evident that staff and education personnel should continuously acquire new skills, knowledge, values and attitudes. It is also noted that if it should have lasting effects on practices in schools, professional development should be supported and accepted throughout the education department. The following discussion focuses on the nature and scope of professional development in schools.

### 2.3 THE NATURE AND SCOPE OF PROFESSIONAL DEVELOPMENT IN SCHOOLS

According to Morphet and Millar (1991:28-29), no matter how well grounded and open-minded a terminal qualification is, it cannot take into account that by mid-life the majority of learners would be living and working in a radically different life-situation from the one into which they had been inducted. Apparently, Morphet and Millar's assertion suggests that education and training should be regarded as a continuum of living and learning in order to enable learners to increase their ability to cope with the changes in the workplace and in society at

large. To this end, lifelong learning, as suggested in the preceding discussion, is necessary to equip learners with skills they currently do not have and it should also capacitate them to acquire requisite skills for the present and evolving labour market place (Kraak 1997).

### 2.3.1 The quest for redress through lifelong education and training

Lifelong education and training is linked to the quest for compensatory education in situations where certain sections of the population were denied education opportunity in the past (Morphet & Millar 1991). In the South African context, one may argue that educator training in the past has left the South African education system with a mass of poorly trained and skilled educators particularly in Black communities (Mncwabe 1990). It suffices to state that the challenge in the present dispensation is to ascertain that more Black educators acquire not only teaching qualifications that are comparable with those of their peers in other countries, but also to acquire required skills and knowledge to inculcate effective teaching in schools. The Department of Education (1997a) accepts the need for skill amplification [as viewed from the South African perspective] since this is interconnected to continuing education in order to develop knowledge and competences of educators.

The ANC (1994:85) contends that lifelong learning is a necessity in the labour market that requires training and retraining for new and existing jobs. In this context, school managers should view lifelong learning as an important strategy for continuing education and training that are essential components of staff development in schools. In this context, Morphet and Millar (1991:34) note that continuing education and training is not an imperative only for insuring equity and redressing imbalances of the past, it is a non-negotiable imperative for greater personal fulfilment, greater economic productivity and growth of civic awareness and responsibility. It is apparent that Staff development entails instrumental

criteria of education relevance especially in relation to workforce development and employability (Kraak 1997). Ostensibly, staff development programmes are to be directed towards the promotion of career training in order to provide schools with a sufficiently trained workforce.

According to Mohamed (1996), continuous learning needs to be based on a process of skill formation that is broader than mere training. In the light of the preceding statement, education should meet short-term learning needs in the country and also emphasise the learning of specific knowledge and skills that would lead to re-engineering of education and training. There is no way that one could deny that education and training is a sine qua non for sustainable development and planned social development. In the light of the preceding statement the HSRC (1981:86-87) states that:

... The demand for continuing education outside the formal education is of special importance in providing the economy with the necessary workforce in the short term and in improving the quality of life of unskilled adults in particular...

Just as the HSRC views continuing education as essential for providing the economy with a skilled workforce, Van der Stoep and Louw (1991:100) contend that non-formal education, through learnerships, creates an infrastructure for continuing education and training with the aim of accommodating large numbers of learners who have a need for re-training in a variety of fields. In parallel disposition, Haasbroek (2002:442) notes that from the point of view of economic growth and development, it is the quality of the labour influence and not its size that counts. This assertion puts pressure on the schooling system to generate a quality and skilled educator corps. If the schooling system has to fulfil its mandate of providing the industrial sector with a highly skilled and knowledgeable workforce, then educators and school managers would need to be reciprocally well trained and skilled (Mathibe 1998). Against the background of the preceding statement, Rothwell and Kazanas (1994:398) present the following essences of continuing educator training and development:

- Improved quality in output;
- Restricted labour turnover and absenteeism;
- Promotion of job satisfaction and motivation; and
- Rectifying poor performance resulting from poor knowledge and skills.

The necessity for educator development cannot be emphasised in the present dispensation, and Mason (1998) contends that everyday new knowledge is created, technology advances and new scientific inventions are unveiled. Within this context, the knowledge of today may not be relevant tomorrow, and Toffler (1980) rightly puts it when he states that knowledge is used and disposed off at an alarming rate. For school managers the implication hereof is that educators need to be continuously developed and trained in order that they do not teach learners things which are not relevant for living and working in the present age. In the light of the foregoing discussion the Department of Environmental Affairs and Tourism (1997:37) contends that the core theme of education for sustainable development includes lifelong learning, interdisciplinary education and education for personal development.

It is concluded that lifelong learning is in vogue in present-day schooling systems while continuous educator development programmes are valued as fundamentals of a productive and self-sustaining schooling system (Mathibe 1998). In this context, school managers should educate and improve themselves and their educators to respond appropriately to the vagaries of the present-day demands on schooling.

The following discussion focuses on the essence of continuing professional development.

### 2.3.2 Continuing professional development [CPD] in schools

Exactly as it is significant for school managers to assist and ensure skills development in schools, they need to play a critical part in the professional development of educators in their schools (Steyn 1998). Falikowski (2002) observes that even if educator professionalism was considered an important factor in the past, it is only recently that the issue of professionalism is pushed to the forefront of debates in educational circles in South Africa. It is acknowledged that in the ever-changing reality of education in South Africa, continuing professional development [CPD] is imperative for educator productivity and competitiveness (ETDP SETA 2002). The ETDP SETA (2002:28) notes the following advantages of CPD:

- changes in learning areas: the need to keep abreast of changes in areas of specialisations;
- changes in pedagogy: the need to keep abreast of new approaches to teaching, learning and assessment;
- policy changes: the need to keep up-to-date with key policy changes in educator development;
- educator motivation: CPD motivates, encourages and revitalises educators; and
- enhancement of knowledge and skills: CPD improves the knowledge of educators both individually and as groups.

One needs to caution that the degree to which CPD would succeed depends mainly on the capacity of school managers to implement its principles. Unlike in USA – which has long adopted the quota system for renewal of teaching licences for the teaching personnel – South Africa has no history of enforcing CPD (ETDP SETA 2002). In addition, Nel (2002) notes that South Africa does not have

performance indicators [PIs] to measure success rates of CPD, and thus its implementation may not be easy to monitor.

In spite of the limitations of implementation of CPD in the RSA, there is a need for a well-developed and sufficiently qualified [and not only certificated] educator corps that would ensure provision of quality education in schools (ETDP SETA 2002). In this respect, CPD should enhance effective teaching and learning in schools. According to Hoy & Miskel (1991), programmes directed at developing an individual must be considered in conjunction with characteristics and effectiveness criteria of the school. It is observed that educators are exposed to development programmes that are not relevant to their work situations and that do not fit in to address their specific needs. It is noted that in most cases educators are sometimes exposed to development programmes they do not need since they have already amassed the knowledge and skills imparted in these programmes (Reitzug 2002:1).

Evidently, CPD evokes confidence in educators and fosters appropriate attitudes on the employer-employee relationships. Nel (2002:499) notes that CPD builds cohesiveness in groups and helps educators to attempt new tasks with confidence. Within the broad social system evolving in South Africa, one may conclude that CPD is a non-negotiable imperative if the country has to make its mark in the world as a competitive and effective democracy (Mathibe 1998). However, Hoy & Miskel (1991) note that staff development programmes undertaken in California in 1987 did not yield expected returns since they did not change the thinking and attitudes of educators. It is apparent that in the South African context CPD should be aimed at transforming educators' values, perceptions, attitudes and thinking. The essence of CPD is immeasurable, and to this effect the ETDP SETA (2002:27) lists the following advantages of CPD programmes:

- improving educator effectiveness;

- enabling experienced educators to prepare for more senior roles in schools in management and leadership, mentoring and quality assurance; and
- building capacity for the education system as a whole.

From the preceding discussion of advantages of CPD it may be concluded that it cannot be separated from WSD. The researcher observes that while it is evident that CPD should be relevant to the specific needs of educators, it should also promote quality in schools. Within the context of CPD, Mashile and Vakalisa (1999) note that educators should be assisted to develop Personal Development Plans [PDPs] that address the following needs:

- Personal development: activities in this domain include stress management, promoting effectiveness and fitness, time management, self-management and interpersonal relationships;
- Pedagogical development: activities in this domain are seminars, conferences and programmes that focus on classroom management, school discipline, cognitive development, the learning process, parental participation, assessment and evaluation;
- Leadership enhancement: workshops and seminars are attended to gain proficiency in policy development, staff development, instructional counselling and motivation; community relations, and mediation; as well as
- Instructional content: in-service training is provided to capacitate educators to acquire subject-specific skills and knowledge, understanding the relationship between learning and child development and critical thinking skills.

Clearly, Mashile and Vakalisa provide a comprehensive basis for CPD and PDPs. Capacity building in school does not only ensure that the school has a sufficiently qualified personnel, it also gives the school the confidence to diversify its

programmes. It would appear that CPD and PDPs are closely linked to human resource planning in schools. According to Dawson (1993:127), human resource planning should thus ensure that proper mechanisms exist to plan for future personnel needs. From the preceding statement it is evident that school managers should engage in human resources development and personnel planning. Key areas in personnel planning include:

- Career progression planning (at various levels);
- Educators movement planning (at various levels);
- Personnel assignment;
- Posting projection;
- Succession planning;
- Recruitment, retention, educators' promotions, postings, and training (Khoong 1996).

The following discussion should elucidate further the role of school managers in personnel planning in schools.

### 2.3.3 Personnel planning [PP] in schools

Towler (2000) describes PP as a method of trying to establish a school's personnel requirements in terms of quality and quantity for a specific period of time, and determining how these requirements might be met. For example, changes in the educational landscape requires that schools constantly engage in processes of personnel planning in order to diversify its output as the outside labour market necessitates. The Department of Education (2001:46) contends that South Africa needs a training and education system based on a distinguished and effective management, policy, planning and monitoring capacity. In this context, personnel planning is not a once of activity, but it is a dynamic process that is relentlessly under re-evaluation and always being customised to schools' needs (Khoong 1996).

Precisely as Khoong suggests that personnel planning should be customised to a school's needs, personnel planning in schools should include a process in which personnel needs are constantly evaluated. According to Dawson (1993:129), the inherent feature of the job of managers, particularly school managers is to plan their personnel requirements, to train their subordinates, to liaise with employee groups, and to deal with personal problems of individual employees in schools. The following discussion focuses on different career planning strategies.

#### 2.3.4 Career progression planning [CPP]

Nel (2002:503) notes that career progression planning is a process whereby an individual sets career goals and identifies the means to achieve them. However, CPP is not only linked to a gradual and steady succession through school grades or subject streams, but it also infers the way a person would like to advance through his or her employment (Mabale 2004). For example, in schools personnel stocks are to be drawn in relation to the change in career prospects of both educators and learners (Nel 2002). SADTU (2000) notes the following about CPP and Continuous Professional Development [CPD]:

- Promoting professionalism, leadership and co-ordination;
- Improving educators' competence through affording assistance with ethical issues and mentoring support;
- Ensuring effective educator regulation including public accountability; and
- Enhancing community outreach efforts through developmental and advocacy work.

In line with SADTU's view of CPP, Towler (2000) notes that it ensures that educators' skills and expertise are linked to forecasted career prospects within the education system. On the other hand Mabale (2004) contends that CPP assists the school manager to recommend opportunities for re-tooling and retraining of educators in line with future requirements of the school. The researcher is of the view that CPP

may be used for skills development and multi-skilling of personnel in the school in order to enhance diversification in schools. One of the mechanisms that schools may adopt to ensure effectiveness in CPP is by assisting educators to draw up balance sheets, listing their strengths and weaknesses (Towler 2000).

Against the background of the preceding discussion it would appear that CPP requires that school managers amass an in-depth knowledge of career development options in the education field. Accordingly, Nel (2002:504) contends that CPP is based on job trends and specific opportunities in the employment market, and in the school situation the manager may determine for each individual educator the list of posts that he or she may possibly move to within a school. A refined form of CPP is career-pathing through which educators are informed about their career prospects and promotional possibilities within the schools [as either prospective school managers or subject specialists] (Mabale 2004). The researcher observes that there appears to be a close link between CPP and staff movement planning.

#### 2.3.5 Staff movement planning (SMP)

Flexibility and mobility are in vogue in present-day organisations, and schools may learn from what is happening in industries to prepare their educators for the flexibility and mobility that characterise modern organisational development (Mason 1998). In the same vein, Nel (2002:505) notes that staff transfer within departments and between schools may help an educator to acquire new skills and knowledge needed for further promotion. The premise on which SMP is based is that staff in a school may also be transferred and moved to new roles when there is a demand for diversification in the school's output. Seemingly, SMP is linked to the dictates of operational requirements as indicated by the mix on personnel supply in the school (Towler 2000). While this concept is foreign to education, it is one of the most exiting possibilities for re-engineering of education and educator mobility.

Mabale (2004) is of the opinion that with SMP educators are not locked in dead-end roles since they are given the opportunity to undertake new roles and responsibilities in the school situation. Furthermore, SMP combats educator indifference to their work since they do not vegetate in one class and teach the same subject from their first day at school until they retire (Nel 2002). The versatility advanced by SMP is significant since it enables educators to acquire more knowledge and skills about the functioning of schools, and thus there is a link between SMP and personnel assignment.

#### 2.3.6 Personnel assignment (PA)

In the same way as schools need to support career development, it is equally important that young and newly appointed educators be exposed to constant support, feedback and development (Nel 2002). The rationale for the preceding statement emanates from the fact that newly appointed educators are usually not only faced with new challenges in their workplaces, they also have to master the way tasks are performed in their new work (Legotlo et al. 2002a). With PA, school managers distribute new educators to units to work in as per school requirements (Towler 2000). However, unlike SMP, PA may be applied in schools through processes such as class allocation, delegation of responsibilities and secondment to other departments. This form of induction is necessary for giving novice educators a holistic conceptualisation of what teaching entails (Mabale 2004).

Substantially, PA ensures that just as there is a tendency in the business sector to allow job entrants to define their roles and contributes to the drawing up of their personnel assignments (Nel 2002), school managers may allow newly appointed educators to do the same. From the preceding discussion it may be deduced that PA assists the incumbent to work prudently and judiciously towards satisfying the requirements for consideration for progression in the occupational ladder.

### 2.3.7 Summary

Professional development may take different forms such as training, on-site processes, networks and professional development schools. Nevertheless, development and enhancement of educators' potential should relate to the work they are doing of not only nurturing the intellectual potential of learners, but also of their moral formation and appropriate humanisation according to national policies and goals. In schools professional development may be instituted through on-site training, networks and collaborative activities. The school manager should engage in an array of professional development initiatives such as:

- personnel planning as a method of trying to establish a school's personnel requirements in terms of quality and quantity for a specific period of time, and determining how these requirements might be met;
- career progression planning is a process whereby an individual sets career goals and identifies the means to achieve them
- staff transfer within departments and between schools may help an educator to acquire new skills and knowledge needed for further promotion; and
- PA may be applied in schools through processes such as class allocation, delegation of responsibilities and secondment to other departments.

The following discussion focuses on models of educational management in schools.

## 2.4 MODELS FOR EDUCATIONAL MANAGEMENT IN SCHOOLS

Management and leadership entail control, and control in this sense is explained as the work the school manager does to assess and regulate work while it is in progress or when it is completed (Van der Westhuizen 1999:216). If this is the case in all organisations, then school management and leadership ensure continuous monitoring of tasks in schools in order that effectiveness and productivity are enhanced. Batch and Sisson (2000) are of the view that by accepting the school principalship role, the school manager becomes the initiator

and supervisor, a listener and problem-solver as well as a coordinator and conciliator. Another dimension to school management is forwarded by Harcombe (2003) as she quotes Lao-Tse<sup>4</sup> when he stated that:

... A leader is best  
 when people barely know he exists,  
 not so good when people obey and acclaim him,  
 worst when they despise him.  
 But of a good leader who talks little,  
 when his work is done his aim fulfilled  
 they would all say "we did this ourselves..."

From Lao-Tse's characterisation of a leader it may be construed that effective school management involves getting people: educators, learners and parents to fulfil their tasks to the best of their abilities. There seems to be a link between productivity in schools and effective management of educational moments and consequently, Leithwood (1992:9) states:

... the collective action which transforming leadership generates confidence and empowers those who participate in the process. There is hope, there is optimism, and there is energy. In essence, transforming leadership is a leadership that facilitates the redefinition of people's mission and vision, a renewal of their commitment and the restructuring of their systems for goal accomplishment...

Leadership per se may be seen as that human quality or factor which guides a school towards achieving its goals by means of the voluntary collaboration of members of that school (Van der Westhuizen 1999). It suffices to state that school managers should empower stakeholders to take responsible actions for the school's development. Being responsible for the school's development is essential, and Covey (1989:71) states:

... Look at the word responsibility – response + ability: the ability to choose a response. Highly proactive people recognise their responsibility. They do not blame circumstances, conditions, or conditioning for their behaviour. Their behaviour is a product of their

<sup>4</sup> Lao-Tse is a Chinese philosopher who lived some 2500 years ago (Harcombe 2003: 121).

conscious choice, based on values, rather than a product of their conditions, based on feelings...

From Covey's assertion it would appear that leadership and management flourish in a situation where responsible actions are made. In addition, effective management and leadership result from collaboration of school managers and stakeholders. To this end, Table 2.7 summarises roles and functions of a school manager.

Table 2.7: Roles and functions of a school manager in a school

Role	Function
Communication	<ul style="list-style-type: none"> <li>• communicating corporate vision;</li> <li>• empowers and encourages others;</li> <li>• gives constant feedback</li> </ul>
Counselling	<ul style="list-style-type: none"> <li>• assisting others to define their problems;</li> <li>• assisting others to set achievable goals;</li> <li>• motivating others to take action;</li> </ul>
Consultant	<ul style="list-style-type: none"> <li>• develops corporate values and culture;</li> <li>• delegates power and duties to achieve goals;</li> <li>• assesses schools needs and challenges;</li> <li>• ensures quality of service and products;</li> <li>• co-ordinates and plans human resources</li> </ul>

Adapted from Werner (2002a).

Ostensibly, Table 2.7 differentiates roles and a function of school managers and consequently, it is evident that school managers should provide mechanisms for communication, counselling and consultation in schools. The researcher is of the opinion that a communicating and consultative school manager encourages group cohesion in the school. In line with the view expressed in the preceding sentence, one would expect the school manager to have skills to:

- gather and evaluate data;
- communicate and formalise operating protocol;
- solve problems and make good decisions;
- identify and resolve conflicts;
- synthesise conflicting view points; and

- deal with values, vision and the future of the school with eagerness (<http://www.nsba.org/sbot/toolkit/sStructure.html>).

The following discussion focuses on some of the most common models of educational management.

#### 2.4.1 Formal models

Bush (1995:30) notes that formal models are based on the assumption that managerial decisions are made through a rational process. Characteristically, decision-making processes in formal models are evaluated and considered in terms of organisational goals and objectives. On the other hand Basson et al. (1995:602) list the following points about formal models of management in organisations:

- There are clearly defined policies;
- They have hierarchical structures;
- Tasks are entrusted to people whose posts are clearly defined [such as in a bureaucracy];
- There are suitable rules and regulations for carrying out activities;
- Activities are coordinated to a great extent by effective mechanisms of control;
- Membership is official; and
- Organisations do not dissolve if some of the members leave.

The picture that Basson et al. present about formal models is that of an orderly approach to business and activities of an organisation. It is noted that formal models encourage creation of concrete structures, systems, policies, appropriate management approaches and a fixed reward system to ensure productivity in organisations. The following discussion should elucidate some of the more prominent formal models.

#### 2.4.1.1 Structural models

One of the most prominent formal models is the structural model. Just as structural models emphasise the primacy of organisational structures, key elements of these models are compatible with the central features of any formal model (Bush 1995:31). For example, Bolman and Deal (1984:32-32) list the following assumptions of the structural model:

- Organisations exist primarily to accomplish established goals;
- For every organisation there is a structure appropriate to the goals, environment, technology and participants;
- Specialisation permits higher levels of individual expertise and performance;
- Co-ordination and control are accomplished best through the exercise of authority and impersonal rules; and
- Structures may be systematically designed and implemented.

When one considers Bolman and Deal's view on the structural model, one may observe that a school manager has to create structures in order to distribute resources that are available in a school. In the same vein, Van der Westhuizen (1999:95) notes that the school manager decides on activities and resources that are to be procured. Furthermore, Robinson (1992:97) notes that it is necessary for the school manager to detect the potential developmental opportunities in order to allocate resources judiciously and appropriately. It is observed that maintenance of structures may over-shadow service delivery, and to this end Ndengwa et al. (1987:15) state:

... the increasing urgency of improving managerial performance in the government, parastatals, and private-enterprise sectors is necessary because the increasing scarcity of resources makes greater efficiency in their utilisation imperative... the achieved levels and trends of managerial performance on present and

traditional lines appear inadequate and, without managerial innovations, they are likely to remain so...

From Ndengwa et al.'s view it appears that resource allocation, structuring and restructuring should be linked to judicious acquisition in an institution. It is noted that it is a manager's duty to recruit relevant personnel for the school, to assign duties and responsibilities and to evaluate if the personnel ensures attainment of the school's vision. Additionally, structuralists tend to see organisations as closed systems pursuing explicit goals (Bush 1995:31). The preceding statement infers that closed systems gravitate for some degree of certainty and predictability. However, Morrison (1998:1) contends that systems evolve from one state to another, and as a result there are no longer absolutes in systems. For example, schools and other organisations are highly dependent on the environment, and consequently they are continuously vulnerable to environmental influences. Against the background of the preceding statement, Bush (1995:31) notes that a variety of structural mechanisms are necessary to maintain and sustain consistency in the schools and organisations. In addition Nel (2002:62) also notes that structures do not only provide the systematic division of work in schools, but they also indicate the degree of coordination that is implemented to ensure the attainment of tasks.

It is apparent that creation of operational and functioning structures in schools does not only enhance the delegation of duties in an appropriate manner, but it also ensures that school functions are carried out in an organised and coordinated manner (Van der Westhuizen 1999). The preceding statement suggests that if there were no structures in a school it would be difficult, if not onerous to have effective teaching, learning and schooling. Accordingly, Robinson (1992:219) notes that effective schooling requires a balance between structures that deal with the three Cs namely: consciousness, competence and confidence in schools. Surely, in the case of organisational leadership, setting up structures is a basic

necessity for efficacy of teaching and learning. The researcher is thus of the opinion that in schools structures should:

- entrench the formal chain of command,
- prescribe lines of communication,
- ensure appropriate allocation of responsibilities, and
- facilitate development of decision-making relationships.

It would also appear that structural models are linked to systems models of educational management.

#### 2.4.1.2 Systems models

According to Bush (1995), systems are standardised behavioural ways of doing things, including policies, procedures and practices that are designed in order to expedite the productive capacity of organisations. In the same vein, systems theorists emphasise the unity and integrity of the organisation and the focus of the interaction of constituent parts with the external environment (Bush 1995:33). In view of the systems theory, effective organising in educational contexts is based on the principle that tasks need to be carried out effectively to ensure school effectiveness (Van der Westhuizen 1999). It is essential that systems in the school operate in tandem with the following dimensions listed by Robinson (1992:155):

- Service utility or the extent to which the school is effective in utilising talents, resources and qualifications of its educators;
- Adaptability or the extent to which the school is flexible and responds to demands by providing appropriate resources at an appropriate time;
- Effectivity or the extent to which educators feel committed to the school and are satisfied with their working conditions; and

- Feedback on the extent to which management goals are fulfilled from educators and it provides educators with information regarding evaluation of their work.

Taking cue from Robinson, Chung (1994:24) notes that *effective school managers* build up unity of purpose and unity for purpose in schools. The premises here is that effective management and leadership emanate from uniting people of different interests, backgrounds and abilities into one coherent and cohesive body working for a common purpose (Chung 1994:24). According to Robinson (1992) unity of purpose ensures synergy and symmetry between skills in schools and technology or physical resources available in the schools. It is also noted that the quest for effective management and leadership necessitates that a school manager creates effective working relationships in the school. For example, working conditions are improved to ensure that work is done in an agreeable and sympathetic environment (Chung 1994:27,26).

It is observed that to all intents and purposes systems models replicate and reinforce conventional ideas in mechanical organisation models. As a result Addleson (2004:2) indicates that the systems models have the following features:

- The organisation is represented as a machine, like an automobile engine, with a structure;
- The people who work for the organisation are separate from the organisation [so if you take people away the organisation will still exist];
- These people, including managers, are independent units with separate identities, roles and responsibilities;
- Organisations have goals and problems. To reach the goals the problems should be solved; and
- A manager's role is to solve the problems of an organisation, that is helping it to achieve its goals.

From the preceding discussion, it appears that Addlestone is of the opinion that the systems model locates power and authority in the office of the school manager. As a result, the systems approach creates an authority structure in which each employee occupies a particular position and performs a set of tasks according to the job description. Addlestone (2004) also notes that in a system the manager is the driver, and the employees are passengers since the power and authority to solve problems are located in the management position as in a bureaucracy.

#### 2.4.1.3 Bureaucratic models

According to Bush (1995:35), the bureaucratic model is strongly associated with the work of Weber who concluded that in formal organisations bureaucracy is the most efficient form of management. Bureaucracy presupposes power and authority, and Wiechers as cited in Van Wyk (1987:81), defines the concept 'educational authority' as 'emanating from juridical status and certain legal relationships'. The juridical status of school managers bestows the right to administer and manage in institutions, and for this reason Weber (1989:16) states that:

... the purely bureaucratic type of administrative organisation ... is, from a technical point of view, capable of attaining the highest degree of efficiency and it is in this sense formally the most rational means of carrying out imperative control over human beings. It is superior to any other form in precision, in stability, in the stringency of its discipline, and in its reliability...

It is apparent that Weber regards a bureaucracy as the most important strategy for attainment of efficiency in an organisation. As a result, the management of schools has been conditioned by the ideology and practice of hierarchy and control to a point at which it attracts the pejorative term of managerialism (Osborne 1990:9). Evidently, the needs of managers, organisations, systems, bureaucracies and routines dominate in bureaucratic systems to the detriment of learners. Bush (1995), cites Baldrige, Curtis, Ecker and Riley (1978) when he states:

... under the bureaucratic model the leader is seen as the hero who stands at the top of a complex pyramid of power. The hero's job is to assess the problems, consider alternatives, and make rational choices. The hero holds much of the organisation's power, and great expectations are raised because people trust the leader to solve problems and fend off threats from the environment.

The essence of the preceding quotation by Baldrige et al. is that there is a wide margin between partnerships and bureaucracy since power is sited at different loci: the partners and the bureaucrats respectively. In a bureaucracy the manager is a lone ranger, the hero that takes credit for the successes of the organisation (Bush 1995). A bureaucracy erodes the power of customers, and Van Dyk (2002:20) notes that potential customers or clients and educators are an integral part of the social environment in which the school manager operates. Van Dyk's view implies that for the school to prosper and attain its vision it is essential that a school manager ensure a balance between his or her authority and the vision of the school, the needs of educators and the needs of clients/customers. It is therefore argued that educational authority – in the present-day – does not suggest moribund and unchangeable management and leadership strategies, but it refers to thoughtful approaches to dealing with people. In consequence, Davis and Troupe (1990) state that:

... but you have got to have style in whatever you do – writing music, painting, fashion, boxing, anything. Some styles are slick and creative and imaginative and innovative and others are not ...

In the preceding discussion Davis and Troupe emphasise way of thinking, creativity and innovativeness in school management as a technique of generating purposeful and effective structures in schools. The following discussion focuses on the rational models.

#### 2.4.1.4 Rational models

Rational models differ from other models in the sense that they emphasise processes rather than organisational structures or goals (Bush 1995:38). As it

appears from Bush's statement, rational models focus on decision-making processes instead of structural frameworks. Similarly, Cuthbert (1984:39) notes that in rational methods the management process is depicted as a systematic, informed, and rational decision-making process. Linked to Cuthbert's argument is the idea that to test the school's effectiveness one should look at the degree to which society benefits from it [the school] (Dawson 1993). Proponents of the rational models note that in a free market economy clients or customers do not only buy commodities, but they also pay for the service they get from traders and dealers (Chung 1994). As a result, the school – as a service and business enterprise – should make every effort to satisfy its clients, and this requires improved service delivery. In this context, the rational models would propound that the school manager should ad infinitum monitor and review operations in the school in order to improve product quality and service delivery in tandem with the needs of the clients (Dawson 1993).

The preceding discussion augments the rational model's premise that management should give direction to the common activity of people in order to ensure that they accomplish their tasks effectively (Van der Westhuizen 1991:181). Consequently, Cuthbert (1984:38) is of the opinion that rational models lead to identification and evaluation of possible courses of action, choice of preferred alternatives, implementation of plans, and effective monitoring of standards in a cyclical constant process. Conversely, Doyle (1984) provides a more universal appraisal of rational models when he states that:

...the most enlightened school managers today are those who take pride in reaching out for help from whomever they may get it. These school managers know their limitations and accept them as part of their human makeup. They are the first to recognise what they may do well by themselves and when they need to enlist the aid of others. It is not a matter of massaging egos, it is a matter of doing what is necessary to solve complex problems. The enlightened school manager looks for diversity of inputs as a natural and recurring part of his or her job...

Doylen's line of reasoning on management seems appropriate for giving surety and forte in organisations in respect of planning and dealing with developmental issues (West-Burnham 1994). In most global societies it is thought that sustainable development may be attained through rational processes and application of knowledge, the building of capacity and provision of lifelong learning opportunities for the citizenry at large (Mason 1998:50). In the milieu referred to in the preceding statement, rational models appear to be appropriate for school management in the sense that educational moments become part of the strategy for organisational development.

There is a link between rational models and hierarchical models.

#### 2.4.1.5 Hierarchical models

Hierarchical models emphasise vertical relationships within organisations in which power relations are locked in occupational ladders. As a result, Pachwood as cited in Bush (1995:39), views the significance of a hierarchy as a structure for achieving work objectives that are beyond the control of a single individual. On the other hand, Pachwood (1989:9-10) states that:

... one of the basic properties of hierarchical organisations is the way in which occupational roles are graded in a vertical hierarchy. Authority to prescribe work passes from senior to junior roles, while accountability for the performance of work passes in the reverse direction from junior to senior. Authority and accountability are impersonal in that they are attached to roles, not to the personalities of individuals who occupy roles... the school manager defines the work of the deputy...

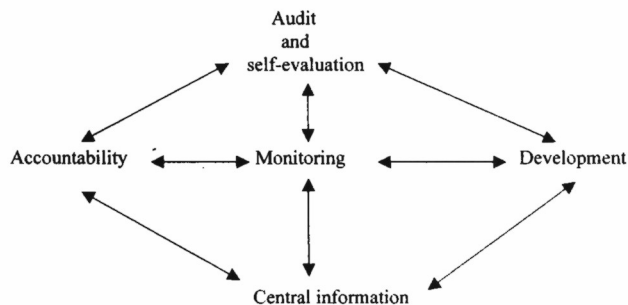
From Pachwood's assertion it appears that hierarchical models over-emphasise managerial accountability with a view of ensuring quality in production. Accordingly, Steyn (1998) concludes that quality comes from leading and encouraging educators to monitor and inspect their work. On the other hand, Van

der Westhuizen (1991:216) notes that quality control is an overall term that includes all management and leadership activities that are aimed at determining whether the activities of the school still coincide with its goals. In line with hierarchical views in schools Deresh and Playko (1994) quote Weldy (1979:1-2) when they state:

... in many ways the school principal is the most important and influential individual in any school... it is his/her leadership that sets the tone of the school, the climate for learning, the level of professionalism and morale of the teachers and degree of concern for what students may or may not become... If the school is vibrant, innovative, child-centred place, it has a reputation for excellence... If students are performing to the best of their ability, one can always point to the principal's leadership as the key to that success...

It is of fundamental value to note that hierarchies in education are based on the premise that school managers are key personnel in the effort to improve quality in schools. Some of the school manager's roles are captured in Figure 2.11 that presents a monitoring and evaluation diamond that may be adopted in schools.

Figure 2.11: The monitoring and evaluation diamond



From Figure 2.11 it would appear that school managers are curators and protectors of academic standards, rules and procedures in schools to ensure that educational objectives are effectively and efficiently accomplished. Accordingly, Ndengwa

(1987:31) notes that through quality control and monitoring the manager creates and maintains an environment that facilitates the pursuit of productive labour by all stakeholders. In the light of the preceding discussion it is evident that control implies mediation between organisational objectives and educators' output. As a result, Chung (1994:37) notes that school managers should set quality standards aimed at:

- ensuring that work and responsibilities are clearly defined;
- controlling power by creating appropriate checks and balances; and
- regulating supervision of operations in the schools.

From Chung's assertion it may be construed that quality in education requires a variety of strategies that the school manager should adopt for, and adapt to the school's unique situation. Frase and Hetzel (1990) thus contend that ensuring quality and excellence in teaching is the school manager's most important role. Collins (1993:20) notes that improving quality of work processes and involving the staff in quality control requires the design of quality products and providing educators with opportunities to inject their own creativity and ideas in their work. It goes without reason that school managers should keep the school on target by touring the school, conducting frequent classroom visits, and asserting themselves in instructional programmes (Frase & Hetzel 1990). In the same vein, the Department of Education (2001:43) notes that the quest for quality in education involves:

- Quality of output that is ensured by effective learning programme delivery, resources as well as support provided to learners and educators;
- Quality of the process that includes quality of teaching and learning experiences offered through organised curriculum, and creation and delivery of meaningful pedagogical experiences;
- Quality of the product that includes skills and abilities of learners who would be regarded as employable, creative, confident as well

as possessing the necessary values and attitudes to work and study further; and

- Quality as a process through which participation of various stakeholders is ensured and enhanced.

To further deepen the debate around quality in production – as explicated by the Department of Education – Dawson (1993:245) notes that while it is easier to assess the quality of a manufactured product [since its constituents may be measured against predetermined standards], measurement in the service sector [such as in schools] is more challenging since quality issues are less easy to identify. Obviously, assessment of quality is a domain for experts, and it is apparent that school managers require specialised training and skills if they are to assess the quality of programmes, teaching and learning in schools. Furthermore, Dawson (1993:246-248) suggests that school managers should ensure:

- Intense focus on customers: assessment of customers' requirements;
- Concern for continual improvement: monitoring quality of products and reviewing of production methods;
- Improvement on quality: avoiding poor quality as a much more effective strategy than rectification of poor quality;
- Accurate measurement: quality assurance to ensure effective quality and not waiting for complaints; and
- Empowerment of educators: appropriate resources and skills necessary for quality production.

Dawson's conception of quality service relates to customer satisfaction in schools and other service industries. It is thus observed that hierarchical models emphasise accountability of school managers for quality and production in schools. The researcher is of the opinion that accountability and quality may be enhanced

through participation of all stakeholders in schools as it shall be indicated in the discussion of collegial models.

#### 2.4.2 Collegial models

Bush (1995:52) contends that collegial models are based on the assumption that organisations determine policy and make decisions through a process of discussion and consensus. Fundamental to collegial arguments is the notion of joint ventures being associated with organisational effectiveness and perfection in production processes. Collegial models became incomparable in the 1990s (Campbell & Southworth 1993), and in the present-day they are regarded as the best models for good practice (Wallace 1989:182). In addition, collegial models promote collaboration between interest groups in schools. The significance of collegial models is epitomised by Little (1990:166) when he states:

... the reason to pursue the study and practice of collegiality is that something is gained when personnel works together and something is lost when they do not. In effect, the perceived benefits must be great enough that the time personnel spend together can compare with time spent in other ways, on other priorities that are equally compelling or more immediate...

In the preceding discussion Little reaffirms that the increasing pace of change and transformation compels school managers to adopt collegial models. In the same vein, Ndengwa et al. (1987:18) contend that school managers should understand that change – in whatever form – has costs. In this context, the researcher is of the opinion that an ability of a school to transform and change as per operational requirements depends on the quality of its leadership and on the amount of authority the leadership possesses. It suffices to state that managing change requires that school managers to negotiate with and seek mandates from different stakeholders. Similarly, collegiality ensures commonality of values on changes that are to be implemented in schools in order to create resilient and fluid [but not fluctuating] adaptive learning environments (Little 1990).

In line with the preceding discussion Dawson (1993:218) contends that when there is consensus on strategies to deal with changing times and needs, then schools would develop ways of working towards such change. However, when there is no consensus on what should be done in schools, there may not be any basic fount of knowledge on operational plans of schools (Mabale 2004). The need for consensus suggests that development and change may be carried out through people participation and consent as subjects and not imposed on them as objects (Mwosa 1987). Against the background of the preceding statement, Rudduck (1991:21) states that:

... it is the right of educators and learners to know what they are doing and why they are doing it, to recognise the areas where they can, together, influence and improve the experiences of success in schools, and to appreciate in their own that the goal is to extend the possibility of control over their environment and life chances...

Exponents of collegial models view educational management and leadership as being influenced by situational and peripheral factors. In parallel disposition, collegiality challenges the role of the school managers in the traditional model – in which a manager is an administrator who makes unchanging and incontestable decisions (Meyer 1998:105). However, Bush (1995:54) notes that collegial models propagate that decisions be made by consensus since common values and shared objectives leads to resolution of problems. From the foregoing discussion it can be construed that there is a subtle link between collegial models and political models. As a result, the following discussion focuses on political models.

#### 2.4.3 Political models

Political models embrace theories that characterise decision-making as a bargaining process (Bush 1995:73). In the light of Bush's view, Portin et al. (1998:5) contend that in the present educational dispensation the school manager's role is to balance management and leadership responsibilities with prevailing political practices. For example, leadership plays an important role in

processes whereby disputation converges onto positions that everyone may live with (Morley & Hosking 2003:50). It is therefore noted that political models dictate that school management respond to two challenges facing the school namely: political context and a school's content. The following discussion focuses on elucidation of political models on the context vs. content of schools.

#### 2.4.3.1 Political models and the school's context

Accordingly to Hargreaves (1980:197) education systems ensure that collective experiences in the learning situations are embryonic experiences of social solidarity. From the preceding statement it can be concluded that education systems contrive schools to capacitate learners to participate in creation of a civilisation based on mutual trust and respect in order that all people are afforded equal opportunities to contribute towards national development (Dekker & Van Schalkwyk 1995). Political models promote the view that schools are a means to ensure sustainability of national development initiatives that are characterised by social solidarity, political freedom and economic advancement (ANC 1994).

Taking cue from the preceding discussion, Akinpelu (1990:144) notes that human beings are social beings whose interests are best promoted when they live in harmony with others, and this supports the view that people should learn to co-operate with others in matters of common interest. The political and global nature of education, and the universality of relationships people may forge, necessitate that schools develop partnerships not only at local level, but also on an international level. For this reason Mason (1998) contends that a re-engineered educational institution does not view itself as an autonomous learning centre, but as one component in a network reliant on, and strengthened by other institutions performing the same or complementary functions. Furthermore, in the present-day there is a pressing need to teach and educate learners to go beyond the narrow

confines of their local environment since they have to live and compete in an immeasurable and sophisticated global arena (Dekker & Van Schalkwyk 1995).

Against the background of the preceding discussion, the researcher observes that political models are based on the premise that schools can no longer operate as islands in the sea of global challenges. To this end, McKay and Romm (1992:109) note that an educational community [in the present-day] is not only a unitary entity, it is also a collectivity of individuals who are and who ought to be accountable to each other. Seemingly collaborative efforts between institutions of learning, at all levels, are imperative for the cross-pollination of ideas between education practitioners. It is in this context that Burns (1981:122) notes that political models influence educational management to be based on:

- awareness of others and understanding of people of the world;
- viewing peace as fundamental for survival of humanity in the world; and
- working towards constructive social change in the whole world.

From the preceding discussion by Burns it can be deduced that political models advance the view that schools do not operate in isolation, but they are part of the broader world. In the same vein, Ozmond and Craver (1990:38) note that partnerships in schools may ensure the creation of a new conception of knowledge that does not depend on disciplinary boundaries. There is a link between the school's context and environment and its content and curriculum.

#### 2.4.3.2 Political models and a school's content

From the preceding discussion it is apparent that schools exist with an aim of responding to a particular contextual need (cf. 2.4.3.1). As a result of having to

respond to environmental demands, schools adopt practices and programmes that are sanctioned by forces or powers in the environment. In the same vein, Parker and Day (1997:87) note that the political models promote the view that the school manager should perform the following five functions:

- Defining and communicating a clear mission, goals and objectives: formulation, in collaboration with staff members, a mission, goals, and objectives to realise effective teaching and learning;
- Clarifying the school's mission is particularly important when it is undergoing a number of changes;
- Managing curriculum and instruction: managing and co-ordinating the curriculum in such a way that teaching time may be used optimally; and
- Supervising teaching: ensuring that educators receive guidance and support to enable them to teach as well as possible.

It is observed that Parker and Day are of the view that school management should ensure that the school's vision fits in with the visions of the provincial department of education, the national department of education and of the country as enshrined in a country's Constitution. It is also argued that the content taught in schools, whether through the curriculum or hidden curriculum should fit in with the political agenda followed in the country. There seems to be a link between the political models and cultural models for education management.

#### 2.4.4 Cultural models

According to Bush (1995:131), cultural models emphasise the informal aspects of organisations rather than their formal elements, and focus is on how values, beliefs and norms coalesce into shared organisational meanings. It has been indicated in earlier discussions that a school is an open system that may be defined as a learning organisation (cf 2.4.1.2). A 'learning organisation' is defined

as the one that undergoes rapid changes in order to positively and effectively adapt to changing circumstances (Dawson 1993:219). According to Van der Westhuizen (2002), there is a dualism in the concept 'learning organisation: firstly, learning occurs in the organisation, and secondly, the organisation learns from what happens in its environment. It is to be borne in mind that a learning organisation is not static, but it is a dynamic entity that always positions itself in terms of its clients' needs. To explain the functioning of a learning organisation, Dawson (1993) provides the following analogy of a frog:

... If you put a frog in a pot of boiling water it would immediately try to scramble out. However, if you put the frog in a pot of cold water and gradually turn up the heat, the frog would become groggier and groggier, until it is unable to climb out of the pot. The frog would sit there and boil because the frog's internal apparatus for sensing threats to survival is geared to sudden changes in the environment, not slow incremental death. This often happens when modern organisations react only to dramatic changes in the environment, ignoring gradual processes that may be bigger threats...

The analogy of the frog, as presented by Dawson, suggests that a school may become stagnant and irrelevant [to the evolving context] if it does not respond to changes in its environment. For example, for many years schools [particularly in townships and rural areas] operated in isolation and never considered the developments that occurred in their environments (Mncwabe 1990). The schools referred to by Mncwabe have been overtaken by times, and at present they are inapt to society's needs. However, Mason (1998) notes that since most schools are not used to change management it is difficult for schools to adapt to changing environmental challenges. As part of the new culture of schooling, the thrust for conversion of schools into learning organisations and centres is characterised by the need for acquisition of skills and knowledge that promote inquiry, creativity, social communication, problem-solving and real learning (SYNCOM 1991:486). O'Neill (1994:116) thus observes that cultural models generate the perception that a school should not operate in terms of an idiosyncratic logic, but that it works as a macro-cosm of all the activities in the community.

The following discussion focuses on some of the elements in the cultural models of management.

#### 2.4.4.1 Communication as a cultural tool

Communication is as old as human existence, and therefore it is an essential cultural tool for passing on and receiving messages from one person to another. Retracting from the preceding statement, the researcher is of the opinion that in conditions of modern industry where adaptability is so important, communication is essential for aligning an organisation's operations to values and norms of the clients. Similarly, Dawson (1993) notes that: communication does not only bring stakeholders up-to-speed with what happens in the school it also sets precincts for unwarranted criticisms against the school. In parallel disposition Chung (1994:43) lists the following essential points on the essence of communication between the school and its clients:

- Knowing the clients: gaining a thorough knowledge and understanding of the manner in that society functions, its network of values, culture, expectations and relationships affecting how the school operates; and
- Establishing effective public relations: improving perceptions towards the schools by creating a welcoming environment in the schools and developing effective and efficient communication networks with stakeholders and public at large.

It seems as if Chung regards communication as a basic necessity for understanding the needs of society and schools' clients. Just as communication is an essential component of management and leadership, Ndengwa et al. (1987:18) note that one area of management and leadership that specialists need to address more seriously is managing to communicate with other people. Invariably, achievements and setbacks in schools should be communicated to stakeholders,

thereby promoting the culture of transparency. It cannot be denied that communication is essential for effective organisational management and leadership because through it school managers give feedback to educators, clients and other stakeholders and it also addresses distortions that may occur if information is not disseminated through the correct channels. As a result, one may conclude that communication is a fundamental element in enhancing organisational culture, and school manager are urged to use in order to:

- Influence stakeholders to work beyond ordinary levels to attain the goals of the schools;
- Persuade stakeholders to actively engage in activities aimed at schools development; and
- Direct, lead and influence stakeholders in choosing and achieving goals of the schools (Hodgetts 1982:342).

In the preceding discussion Hodgetts accepts that communication promotes give-and-take relationships, and the implication hereof is that school managers should be effective communicators. Communication is the hub of organisational culture, and to this end Mabale (2004) notes that effective communication provides the basis for effective job performance, effective monitoring and effective control of educational standards. Van der Westhuizen (1999:45) notes that communication is essential for monitoring and educational control, as indicated in:

- setting the required standards: a school that prides itself on producing quality results would always set high standards for itself. Every unit in that school works towards maintaining the established standards;
- measuring standards of work: it is universal precedent in present-day school to capacitate units and departments to have quality assurance teams to check if they, departments and units, perform according to required standards;

- evaluating standards of work: while self-assessment is encouraged, schools use peer assessment to evaluate standards of work in the departments and units; and
- implementing corrective action: in most schools developmental appraisal systems are adopted with an aim of establishing systematic models for correction of performance gaps.

Van der Westhuizen's characterisation of communication is that of shared understanding of the school's culture since in a partnership power and authority are shared equally among partners and all take credit for successes of an organisation. According to Ang (2002) situating power in partnerships is a basic necessity for collaboration and cooperation, and thus it can be concluded that cultural models provide focus for school activities. Surely, the effectiveness of communication is necessary for maintaining the focus of employees, and Ndengwa et al. (1987:19) caution that in order to deal with self-interest, both by individuals and by groups, the school manager should communicate the school's vision in clear and unambiguous terms.

## 2.5 SUMMARY

The shifts in management and leadership epochs have resulted in changing conceptions of management and leadership functions. Characteristically, the management and leadership styles of most school managers are influenced by one or more theories of management and leadership. For example, school managers who have been trained under power-centred role expectations often lack the skills and knowledge that are necessary for facilitative leadership. It is observed that facilitative leadership requires considerable time and energy, and it may create confusion and ambiguity if educators and other stakeholders are not aware of their roles and responsibilities in the school situation.

In sum major findings in this chapter include:

- Leadership and management have evolved and changed over the years;
- Management and leadership development is important for school effectiveness;
- Professional development should serve wider goals of the school and should fit in with contemporary needs of society;
- Professional development should be an ongoing activity, not a single event;
- Management and leadership development should be continuously evaluated and improved since the school manager has an array and plethora of roles to fulfil such as forging partnerships, talent-creation, creation of structures, rewarding hard-working employees and quality assurance;
- The school is a learning organisation; and
- Effective professional development requires that continuous inquiry be embedded in the daily life of the school.

The following chapter would focus on the conceptualisation of the principles of the Beehive Model.

## CHAPTER 3

### CLARIFICATION AND ELUCIDATION OF PRINCIPLES OF THE BEEHIVE MODEL

#### 3.1 INTRODUCTION

According to Sacht et al. (2003), organisations' executive officers [CEOs] most frequently turn to examining the balance sheet when seeking to improve business performance. It is noted that while the balance sheet provides crucial information about key financial measures such as margins, return on equity (or assets), revenue, general and administrative expenses, it seldom indicates how human resources are mobilised and utilised in organisations. On the other hand there is a pressing need to find out the relationship between resources for production [personnel or employees] and the forces of production [motivations and morale boosters] in order to comprehend the extent to which these forces inspire productive labour. However, it is noted that a CEO's job is not only to create value for customers and stakeholders [through managing all of the organisation's resources], but his/her job also requires that he/she ensures that human resources are appropriately utilised and maintained (Sacht et al. 2003).

In the light of the preceding discussion it may be concluded that although the balance sheet provides a wealth of information regarding how effectively organisation resources are being managed, it provides little to no information about how effectively people are organised around and within the organisation's core business (Sacht et al. 2003). In essence, the Beehive Model addresses how leadership practices may influence (adversely or positively) employees' ability to effectively execute their day-to-day work responsibilities; and how key human resource management systems and practices such as performance management

may be adopted to ensure sustenance of employees' motivation. The Model is also based on the premise that strategic compensation should be used to inculcate a climate of high performance in which managers and employees at all levels of the organisation should respond quickly to changes in the organisation (Sacht et al. 2003:1). In this chapter the issues on the Beehive model will be discussed:

- The Beehive survey;
- Challenges of the new Economy; and
- Principles of the Beehive Model.

### 3.2 THE BEEHIVE SURVEY OF ORGANISATIONAL FUNCTIONING

Unlike most surveys which gathered employees' opinions and ratings of "climate" issues (management and supervisory practices, communication practices, work-life balance, organisation values, work relationships, etcetera), a Beehive Survey targeted specific areas that had been shown by sound management theory and research to have a direct relationship with high organisational performance (Sacht et al. 2003). For example, in organisations where there is dissonance between organisational expectations and employees' expectations for change, there are hindrances for employees to 'pour their hearts and minds into their work'. Obviously, when employees are demotivated they become unproductive, and consequently organisations would under-perform and their competitiveness would decline (Mabale 2004).

According to Sacht et al. (2003), in a paper delivered at the 2003 Global Conference on Business and Economics, Denton and Bouwer stated that the Beehive Model's structure and the associated (Beehive Survey) questionnaire indicators were soundly supported by recent academic theory as well as the limited available empirical research on related topics. It is possible to conclude

with a reasonably high level of confidence, as viewed against the backdrop of trends in theoretical literature and empirical research on related topics, that compliance with a holistic application of best practice is likely to result in the entrenchment of change and high performance within an organisation's culture (Denton & Bouwer 2003:2). Evidently, the Beehive assessment gives an organisation, department or business unit the opportunity to re-think its workplace practices that research has shown to be strongly related to superior performance in the New Economy (Sacht et al. 2003).

The following discussion focuses on the Beehive assessment.

### 3.2.1 The Beehive assessment

Van Kradenburg et al. (1996:64) observe that in many present-day organisations success is assessed and measured according to the attention given to human resources. One of the assumptions in organisations is that productivity and performance are enhanced in an environment in which abilities of personnel are utilised to the optimum. Similarly, Sacht et al. (2003) contend that the Beehive assessment gives an organisation, department or business unit a plinth to change and improve workplace practices as demanded by the New Economy. It is essential to note that the New Economy puts human resources at the vanguard of business operations.

In the following discussion it will be indicated that the Beehive assessment produced a snapshot of seven essential areas for effective management as shown in Figure 3.1 below.

Figure 3.1: The Beehive Model of Organisational Functioning



From Figure 3.1 it would appear that the information obtained from a Beehive assessment provides managers with knowledge of elementals for management in order to improve the profile and performance of their respective organisations. On the other hand, the seven essentials for organisational management improve performance so that it may be compared to current best practices (Sacht et al. 2003). The following discussion would provide a brief description of each of the seven principles of the Model namely:

- **Strategy:** The ways in which strategy is formulated and utilised as a primary driver of performance within the organisation;
- **Structures:** The extent to which structures are designed to inculcate and drive performance by optimising the organisation's supply chain and the fulfilment of accountability at all levels;
- **Talent Creation:** Workplace practices and disciplines that ensure the optimum development and utilisation of people and their ability to contribute to performance;

- **Business Disciplines:** The adoption and widespread use of a set of integrated business disciplines that inculcate and cause high performance;
- **Stakeholder Commitment:** Developing the alignment of all stakeholders so that they operate as active contributors to the competitiveness of the organisation;
- **Pay and Incentives:** The alignment of pay and incentive systems that attract, retain, and enhance the commitment of people across all levels; and
- **Change Leadership:** The use of proven leadership and processes for implementing change and turning strategy into operational action that delivers competitive performance (Sacht et al. 2003).

From the preceding discussion it can be deduced that Sacht et al. contend that just as a Beehive Survey is designed to collect information on the need for whole systems improvement, the Beehive assessment provides a framework for implementation of universal changes in organisations. It is noted that one organisation may simply require a re-alignment or redesign of one or more of its human resource management systems while for another organisation, there may be need for a more extensive change programme. For example in some organisations it may be necessary to implement changes in structures, the design of key jobs, and management decision practices in order to re-engineer and improve the efficiency and output of core business processes. In the same vein, Sacht et al. (2003) note that the results of a Beehive Survey should be used in concert with other operational, financial, and organisational data to provide a more complete or holistic, view of what needs to change. It is acknowledged that from the Survey data should be used to plan a systematic change programme that is designed to deliver measurable returns (Sacht et al. 2003).

For example, improvement targets should be established based on current financial and operational performance measures, and upon reasonable estimates of the amount of improvement that might be achieved over time (Sacht et al. 2003). Evidently, there is a link between the Beehive Survey and doing business in the New Economy.

### 3.2.2 Doing business in the New Economy

Many fundamental changes are at work in the world's economy, and sweeping developments are affecting most, if not all, industries in both developed and developing economies (Mason 1998). As a result, business leaders no longer have the luxury of maintaining a 'business as usual stance' (Sacht et al. 2003). It is noted that phenomena necessitating a change in business attitudes in the present-day include:

- **Rapid advance of information technology:** The past decade has brought significant gains in computer hardware and telecommunications capabilities. Processing speeds and computing power has increased dramatically, while the costs of computers and data storage have plummeted (Martin & Norman 1993);
- **Engineering:** Many organisations are applying information technology as a way to radically redefine work processes and to transform relationships between both suppliers and customers (Ohmae 1995). This e-engineering is resulting in increasing rates of productivity growth and lower operating costs for many organisations;
- **Deregulation:** The past decade has seen a mounting thrust for eradication of trade barriers around the globe, and consequently some governments removed restrictions to transnational trade. However, in a free market economy competition for markets and clients intensifies (Leysion 1995).

It is noted that for some organisations, deregulation translates into new business opportunities, while for others the move to free trade results in new competitive threats:

- Globalisation: As transaction costs decline, and as regulatory barriers fall to the pressure of market economics, the potential market for any organisation's goods or services increase substantially (Ohmae 1990); and
- Rise of the Internet and e-commerce: By any estimation, the Internet and e-commerce are taking the world by storm. As a result, the Internet is already forcing many organisations to re-examine their business models and their organisations' places within their industries' value chains (Sacht et al. 2003).

It is observed that for some organisations preceding factors – which are typical for doing business in the New Economy – appear to be working together in necessitating the realignment of business operations (Ohmae 1990). However, there also appears to be some 'trouble in paradise' as many organisations experience the most challenging aspect of the New Economy: rapid and unpredictable change (Sacht et al. 2003). Some of the changes that organisations are now experiencing as a result of the new economy (and the rise of e-commerce in particular) include:

- Redefinition of sales channels: The Internet and e-commerce are making it easier for organisations that are "upstream" in an industry value chain (for example, manufacturers and suppliers) to sell directly to those farther "downstream" (for example, end users), as opposed to selling through middlemen. The Internet also facilitates the emergence of a myriad "virtual" contenders now competing directly against "real world" incumbents (Ohmae 1995);

- **Unbundling and rebundling:** Typical of the new competitive thrust in the New Economy, products, services and information are being 'repackaged' at a rapid rate. In this environment, the Internet is leading to the wholesale redefinition of many value chains and industries. For example, the information that was once considered integral to the traditional service offering of some organisations is being cleaved off as a separate product offering. In other cases, the ability to aggregate information is giving rise to new services (for example, on-line mortgage brokers) (Allen 1995);
- **Increased buyer power:** It is also noted that the Internet leads to the lowering of "search costs" for buyers in developed and developing economies alike. As a result, it has become far easier for consumers to identify potential suppliers and then to compare their prices. It is noted that in this free market economy suppliers' profit margins are likely decline. Based on these changing buyer-seller dynamics, most organisations need to redefine their relationships with both their suppliers and their customers (Yearley 1995); and
- **Increased employee power:** It is observed that in much the same way that the Internet results in increased buyer power for purchasers of products or services, employees are gaining greater power in the employment relationships. For examples, employees have instant access to nearly unlimited job openings from everywhere around the globe and they can easily make themselves visible to potential employers through Web-based resources (Sacht et al. 2003).

From the preceding discussion it is evident that the New Economy has ushered in incomparable challenges in the business world, and consequently the evolving reality dictates that there be wholesale changes in the way organisations are managed.

### 3.2.3. A new strategic agenda for business

The extensiveness of changes in the global market's landscape necessitates adoption of new business strategies in their organisations (Sacht et al. 2003). It is noted that there are at least six imperatives that should be on the agenda of any organisations in order to operate effectively in the New Economy:

- **Redefining the organisation's business model:** It is imperative that organisations re-think their strategies in order to adapt to an e-commerce business environment (Ohmae 1990);
- **Reducing cycle time:** As product and industry cycle times become shorter, organisations must be able to move more quickly to take advantage of emerging opportunities. The goal here should be faster decisions and faster time-to-market for new products and services (Dawson 1993);
- **Fostering innovation:** In the New Economy the challenge is to create a culture that encourages risk taking and embraces (the learning from) failure as a way to become a market leader. As technology continues to evolve rapidly, the winners would be those organisations that can quickly test large numbers of new products or services and then learn from and build on each individual experience (Ohmae 1995);
- **Securing talent:** While the competition for talent has intensified generally, a new challenge has emerged: attracting and retaining those individuals required to lead new e-commerce initiatives (Hamnett 1995);
- **Strategic partnering:** As the pace of change accelerates, it becomes harder for individual organisations to adapt organically to this change. Thus, an organisation that cannot build a critical new capability should instead have to buy or partner with an organisation that already possesses that capability (Waters 1998; Smith 1996); and

- **Redefining the role of corporate headquarters:** The emergence of the Internet and e-commerce raises a new set of questions as to what the proper role of the corporate centre should be. Other roles for the corporate centre in the new economy may include coordinating e-business investments, stewarding channel migration and brand management (Sacht et al. 2003).

Against the background of the preceding discussion it can be construed that in line with the Beehive Model, management and leadership models need to be tailored to fit in with the needs of the evolving organisational challenges. The following discussion focuses on current research about New Economy practices in South Africa.

#### 3.2.4. Current research about New Economy practices in South Africa

According to Sacht et al. (2003), the HILL Business School had initiated exploratory research to determine the degree to which South African business was making the shift from a business as usual (Old Economy) paradigm to a New Economy style of managing organisational and people performance. It was envisaged that the Beehive Survey results would provide business leaders and practitioners with important base-line information about where change was urgently required if South African organisations were to be globally competitive and not be sidelined as 'business backwaters' not worth investing capital in (Sacht et al. 2003). In the research anecdotal evidence suggested that operational management and staff tended to have a more negative perception of leadership and workplace practices than people in more senior levels (Sacht et al. 2003). The following discussion presents the methods that were used in the Beehive Survey.

### 3.2.4.1 Methods of research used in the Beehive Survey

In the Beehive Survey referred to in the preceding paragraph, a sample of two thousand one hundred and nineteen (2,119) participants were contacted and asked to complete either an online questionnaire or a paper-based Beehive questionnaire (Sacht et al. 2003). Respondents were asked to assess their organisations on seven sets of workplace practices corresponding to the seven dimensions of the Beehive Model (Sacht et al. 2003).

### 3.2.4.2 Findings of the Beehive Survey between small, medium and large organisations

Table 3.1 below shows that when the findings were split in terms of organisation size by head count it was found that small organisations with up to 50 employees perceived themselves to be relatively further along the road towards New Economy workplace practices compared to medium and large organisations. According to Sacht et al. (2003), this relative difference can possibly be accounted for by the entrepreneurial organisational style required by small organisations adapt rapidly to signals from a dynamic marketplace that rewards change and high performance with growth and development. It is also observed that the scores of respondents from small organisations are higher than the scores of respondents from medium and large organisations in five of the items. Of particular interest is that there is a tie in responses between small and large organisations on the item on pay and incentives at 51%. It is also noted that responses from large organisations are the highest in item 4 – business discipline – which indicates that business discipline is better enhanced in large organisations than in small and medium organisations.

**Table 3.1: Beehive Scores (%'s) for Small, Medium & Large South African Organisations**

Beehive Dimensions	Small (Up to 50)	Medium (Up to 500)	Large (500+)
1. Strategy	57	42	52
2. Structures	64	50	49
3. Talent creation	59	51	56
4. Business disciplines	51	44	54
5. Stakeholder commitment	60	49	63
6. Pay & incentives	51	41	51
7. Change leadership	53	38	49

Adapted from Sacht et al. (2003).

The Beehive Survey was also conducted to compare the competitiveness of organisations in South Africa with other globally competitive organisations.

### 3.2.4.3 Comparison of South African Organisations with other Globally Competitive organisations

Prior research using the Beehive Survey had shown that globally competitive organisations score 70% and higher on all 7 dimensions of organisational functioning (Sacht et al. 2003). In contrast to the score of 70%, the pattern of

scores from the current research indicates that the South African organisations score on average 27% lower on New Economy workplace practices when compared to globally competitive players (Sacht et al. 2003). It stands to reason that while global players score beyond the 70% score-line. South African companies have not yet broken the 30% barrier, and the implication hereof is that there is an urgent need for reconstruction and reformation of business practices in South Africa. The researcher is of the opinion that education and training are key catalysts in instilling productive tendencies that would turn the tide from 27% to +70% in the global markets. Key findings from the current research for each of the Beehive dimensions are presented below in Table 3.2.

Table 3.2: Comparison of Beehive Scores For Globally Competitive Players & South African Organisations

Beehive Dimensions	Global Players %	South African Organisations %
1. Strategy	85	51
2. Structures	71	52
3. Talent creation	84	55
4. Business disciplines	79	51
5. Stakeholder commitment	85	59
6. Pay & incentives	70	49
7. Change leadership	80	47

Adapted from Sacht et al. (2003).

From Table 3.2 it may be construed that South African organisations lag behind global competitors in all the 7 essentials identified in the Beehive Model. It is noted that the data collected from the preceding Beehive Survey reveals the added pressure on South African organisations to accommodate new, unfamiliar challenges and opportunities (Sacht et al. (2003). In addition, Sacht et al. (2003) state that the bottom line message that emerges from the current research is that South African business is still far from capable of entrenching the critical strategic leadership. In the same vein, South African organisations scored low on the two key drivers of business transformation namely: Strategy and Change Leadership (Sacht et al. 2003).

Using the preceding discussion as a point of reference it is noted that South African businesses seem to be wavering between what are regarded as new-economy practices – such as flat structures – and old-economic practices, such as bureaucratic processes (Sacht et al. 2003). Indubitably, the New Economy necessitates adoption of various approaches to orchestrating change in an organisation and instilling a culture characterised by high performance. According to Bauman (1996), in the New Economy managers should develop responsive organisations capable of realigning their operations as demanded by the changing needs of clients. Surely, if global competition is threatening, or new technology is remoulding the market's landscape, or customers are expressing different interests, or industry is consolidating itself, then South African organisations must be able to alter their formulae to meet those challenges (Sacht et al. 2003).

The researcher is of the opinion that while much of the earlier discussion was located in the business sector, it is also relevant and very critical for the reconstruction of education in South Africa. It is observed that just as there is a need to realign operations in the business sector to the needs of society, present-day education systems are characterised by a pursuit of efficiency and productivity, rational control over the human endeavour and an educational logic

that emphasises integration, modernisation and increased systematisation (Anthony, Perrewe & Kacmar 1999). In parallel disposition, Toffler (1980:41) notes that to survive and avert 'future shock' schools need to be continuously adaptable to evolving conditions and also be capable to anchor themselves in the new reality. Surely, to provide for the anchorage alluded to by Toffler, present-day societies expect an improvement in the quality in education in order to promote productivity through the learning processes. Marchello (1987:556) thus notes that educational functions have been adapted to the intellectual realities of the computer revolution, and consequently schools have been turned into appendages of the IT society.

It is noted that adaptation to life in the computer age, and survival of the information society in the raging sea of technological advancements are intertwined processes that require effective management of changes in society. To this effect, the following discussion elucidates the implications of the principles of the Beehive Model for management and leadership development in schools.

### 3.3 STAKEHOLDER PARTICIPATION

According to the Hill School of Business Beehive Survey of 2003, the forging of stakeholder commitment ranked the highest in the quest for organisational development (Vaida 2003). In the light of the preceding statement it can be deduced that organisational development requires all stakeholders to work actively towards making the organisation competitive. The Beehive Survey found that stakeholder participation to be the highest ranked new-economy practice since around 60% of respondents believed this principle is actively cultivated by their organisations (Sacht et al. 2003). Surely, stakeholder participation involves developing a clear process of trying to meet stakeholder interests, the elimination of racial and gender discrimination, as well as making diverse groups feel valued and respected.

In line with principles of the Beehive Model, stakeholder participation encourages the development of a flatter, more consultative style of management with bottom-up processes, and this distinguishes new organisational management strategies from 'old' rigid authoritarian top-down hierarchies (Oosthuizen & du Toit (1999:213). In the same vein, Ndengwa et al. (1987:1) observe that organisational development is enhanced when one accepts the concept of genuine participation through which people agree on developmental imperatives within an organisation. It is acknowledged that stakeholder participation illustrates that schools are no longer the private spheres of influence of managers, but they are institutions in which all stakeholders share common values and outcomes through consultative processes (Sacht et al. 2003). To indicate the significance of stakeholder participation for organisational development Ndengwa et al. (1987:1) state:

... in the absence of stakeholder participation and commitment you would have to accept the logic of reducing the social system to one where influence is the main motivation, if we do not get the individual stimulated and excited then we are deceiving ourselves. Without participation there can be no true commitment to the journey...

Ostensibly, there is a link between stakeholder participation and commitment to organisational development. The following discussion focuses on participatory management and its importance for organisational development.

### 3.3.1 Participatory management and organisational development

The pre-eminence of participative leadership and management in organisational development is based on the assumption that empowering people results in a more responsive, more flexible, and ultimately more effective organisation (Ang 2002). Participative leadership is more than a willingness to share influence, it entails formal patterns of participation through which stakeholders are not only objects for organisational development, but active partners for the daily operations in a school. According to Oosthuizen and du Toit (1999:213), the shift to participative leadership in institutions is both inevitable and necessary since issues that are

faced in the workplace are too complex to be solved by a few people in authority. The researcher is of the opinion that in an empowering and developmental institution the contribution of educators is encouraged since it is necessary for optimising the school's potential.

In the present-day schools require participatory management to replace tendencies through which management and decision-making processes are locked in rigid bureaucratic structures (Sacht et al. 2003). Mwosa (1987:119) rightly notes that instead of the single 'bottom line' approach on which most some executives are taught to fixate, the new school manager requires attention to multiple bottom-lines. In the context referred to in the preceding statement, the social, environmental, informational, political and ethical factors are integrated to ensure participatory management in schools. For this reason, Hall (2000) notes that schools need managers who would provide leadership towards attainment of schools' visions and missions by:

- Providing time for reflection;
- Strategic planning;
- Monitoring of educational moments and processes;
- Reducing chances for overlapping;
- Controlling production; and
- Assisting in quality management.

In the foregoing discussion Hall suggests a shift towards reflective management to ensure participation of different interest and stakeholder groups in ensuring quality and effectiveness in schools. Invariably, the challenge facing managers is to ensure the alignment of all stakeholders so that they operate as active contributors to the competitiveness of schools (Oosthuizen & du Toit 1999). Similarly, Covey (1989:190) presents the following six major deposits to indicate the importance of participatory management in organisations:

- Understanding the individual;

- Attending to little things [kindness & courtesy];
- Keeping commitments [keep promises];
- Clarifying expectations [eliminate uncertainties, misunderstandings];
- Apologising sincerely when making a withdrawal; and
- The laws of love and life [love unconditionally].

From Covey's six deposits it would appear that school managers should negotiate with stakeholders to participate actively in school activities. The essence of negotiation and genuine communication is that expectations are clarified in order to reduce misconceptions and misunderstandings in organisations. For this reason, Van der Westhuizen (1999:435) states that communication ensures downward, upward and horizontal flow of information in schools. On the other hand, Table 3.3 indicates how participatory management may be practised in schools.

Table 3.3: Changing schools from top-down management

Expectation	Manifestation
School managers lead rather than instruct	School managers rely on support of educators.
Decision-making hierarchy becomes flatter	Flatter, more open and participative structures are formed
Responsibilities are shared	Development of teams for sharing responsibilities in problem-solving
Leadership is about empowering participants	Empowering others to make decisions rather than controlling them
Developing instead of delivering expertise	Creating processes and structures that develop expertise through staff development programmes
Commanding respect through stature and not status	Respect won through demonstrating that respect is deserved through success and getting things done
Emphasising effectiveness and not only efficiency	Emphasis is on commitment to constant and continuous improvement

Adapted from Steyn (2002:256-257).

From Table 3.3 it may be deduced that participatory management encourages inputs from stakeholders in order to ensure effective school development. It is observed that there is a link between participatory management and to forging of partnerships in schools.

### 3.3.2 Partnerships and organisational development

Faced with changing markets, advancing technology and increasing competition, many institutions understand that success requires not only capital and technological improvements, but also changes in the way human relations are managed (Pearson 1992:91). In the same vein, Mwosa (1987:121) notes that profitability and efficiency do not only depend on getting people going, but also on serving people. It is argued that the two preceding assertions emphasise the importance of developing and forging links with people who have an interest in the organisation. In the light of the preceding statement, Chung (1994:38) notes that partnerships are necessary for enhancing public relations, and public relations constitute an important and integral part of the school manager's responsibilities. It goes without reason that the neglect of creation of effective public relations with clients served by an institution may lead to aversion and alienation and consequently, rather than appreciating its effective points, they would exaggerate its weaknesses (Oosthuizen & du Toit 1999).

According to Chung (1994:43), by creating an effective public relations image of the school, the school manager would also learn more about both the internal clients [educators of the school] and external clients [people served by the school]. Learning about clients is necessary since gaining a thorough knowledge and understanding of the manner in which they function yields valuable information about their network of values, culture as well as its latent and visible relationships (Oosthuizen & du Toit 1999). It is acknowledged that forging partnerships and networks are *sine qua non* for productivity and development in

modern business enterprises (Robinson 1992). Partnerships per se are based on the principle of equality in which none of the partners has more power than the others.

The Department of Education (1997:8) notes that effective partnerships require:

- mutual trust and respect;
- shared decision-making;
- that partners agreed on shared goals and values;
- attainment of a common vision; and
- open communication between parties in partnerships.

Against the background of the Department of Education's version on requirements for partnerships it may be construed that school managers should develop effective communication channels between schools and their partners. Just as it is acknowledged that partnerships presuppose equal distribution of power, Chung (1994:43) argues that they should establish an effective public relations strategy for schools. For example, partnerships should not only assist in improving perceptions towards the institution by creating a welcoming environment in the institution, but they should also develop effective and efficient communication networks with stakeholders and the public at large (Oosthuizen & du Toit 1999). As a result, Robinson (1992:260) states that:

... oddly enough, the best way by far to engage others is by listening – seriously listening to them. If talking and giving orders was the administrative approach of the last fifty years, listening (to lots of people near the action) is the approach for the 1990s and beyond...

It would appear that Robinson is of the opinion that it is within the ambit of the school management's mandate to build partnerships with stakeholders. It is lucid that partnerships depend on communication, and effective communication spirals and weaves throughout the whole school and provides links between departments or units of production (Steyn 2002). According to Hoy and Miskel (1991:357), the following points are essential in partnerships:

- channels of communication should be known;

- channels should be accessible to all members of the schools;
- direct and short communication channels should be developed;
- every channel of communication is to be authentic; and
- there should be reputable information storage and retrieval systems.

In the light of the preceding discussion it is noted that communication is essential in schools, and its boundary-spanning role should link a school to its environment (Hoy & Miskel 1991:365). Noting the essence of communication, Steyn (2002) observes that schools cannot operate efficiently in silos and in isolation, and thus it is necessary that they link and communicate with other agencies with an interest in their business. It is observed that school managers should be capacitated to start communicating, networking and forging partnerships with other agencies. Greyvenstein (1989:28) alludes to the essence of partnerships when he states that:

... networking is the process of developing your contacts for advice, information and moral support as a career to be pursued. Networks consist of influential persons who control access to management and leadership positions, providing visibility, information, support and mobility in interrelated services...

From Greyvenstein's opinion it may be construed that partnerships and networks may assist schools not to operate in isolation but to work in relation with other institutions with an interest in education in order to promote their competitiveness. The following discussion will indicate the link between stakeholder participation and maintenance of business discipline.

### 3.4 BUSINESS DISCIPLINE

Business Discipline indicates the management of performance (as a formal business discipline) that links what individuals and teams do on a daily basis with the organisation's vision and missions (Sacht et al. 2003). In the case of the Beehive Survey, it was found that business discipline is sub-optimised since larger

organisational goals, values and cultural practices and the needs of customers were ignored and neglected (Sacht et al. 2003). Sacht et al. (2003) also notes that the low ratings prominent in the Beehive Survey for business discipline also serve to influence the ratings eminent in the preceding discussion for strategic practices in organisations. According to Vaida (2003), the data collected in the Beehive Survey may account for the overall low competitive nature of South African organisations. The researcher is of the opinion that there is a need to re-define business discipline for organisations operating in South Africa.

Business discipline necessitates the setting up of structures to facilitate goal setting, and problem solving in organisations (Oosthuizen & du Toit 1999). Surely, to turn the situation depicted in the preceding discussion around, organisations need to use advanced technology to find the most valuable clients, identify best marketing techniques, and communicate their successes to their stakeholders (Sacht et al. 2003). As a result, it is observed that competitive organisations put the management information systems [MIS] in place to record production rates, to control production, to record areas to be improved and store vital information (Werner 2002:575). In addition, Haasbroek (2002:436) notes that in the environment of rapid and fundamental change education and training have become the driving influence behind meeting the demand for highly skilled person-power. In the light of the preceding statement, Tomaney (1990) notes that the employee that is required in the new world economic environment is a sort of a scout, sensitive to breakdown with quick reactions and the ability to improvise and take preventative action when the need arises.

It would appear that to maintain business discipline, school managers should select educators or management teams carefully to ensure that the schools are run effectively. Wanjui (1987:124) lists the following points about schools that have an appropriate business discipline:

- Simple form and lean staff;
- Contact with clients;
- Productivity improvement through people;
- Operational autonomy to encouraged entrepreneurship;
- Emphasis on key business values;
- Emphasis on doing what is known best; and
- Simultaneous loose-tight controls.

From Wanjui's view of business discipline it appears that school management should be more concerned with ensuring that educators are assisted to improve the quality of learning and teaching. In the same vein, Mwosa (1987) notes that organisations should decide what they stand for in order to give their clients value for money. It is observed that an effective school does not only ensure that it fulfils its social responsibilities, but it also maintains close contact with its clients. Accordingly, Wanjui (1987:126) states that:

... probably the most important function of management that is ignored is staying close to the customer to satisfy his needs and wants. In too many organisations the customer has become a bloody nuisance whose unpredictable behaviour damages carefully made strategic plans, whose activities mess computer operations, and who stubbornly insists that purchased products should work...

In the preceding discussion, Wanjui emphasises that business discipline demands that school managers continuously work towards satisfaction of customers' needs. The researcher observes that customers' needs are diverse, and consequently managers should diversify the product ranges in their organisations.

The following discussion focuses on ensuring quality in production as an aspect of business discipline.

### 3.4.1 Effectiveness and product quality in organisations

According to Mwosa (1987), the concept effectiveness relates to the accomplishment of organisational purposes and objectives by the balancing utilisation of social and non-personal resources. Green (1987:51) states that effectiveness is linked to goal achievement and group maintenance. It is clear that Green's view of effectiveness relates to achievement of specific organisational goals without compromising the unity and strength of the group. The implication hereof is that group cohesion is essential for attainment of organisational goals. Surely, effectiveness, in terms of business discipline, should nurture the extension of the school's culture. In the context of the preceding statement Hoy and Miskel (1991:216) list the following fundamentals for effective organisational management:

- a bias for action [planning is not a substitute for action];
- promoting a shared vision;
- client-orientation [serve your clients];
- people orientation [productivity comes through people]; and
- achievement orientation [high-quality products are essential].

From the Hoy and Miskel's discussion it appears that the role of the school manager is to motivate educators to perform their roles effectively and as expected. In addition, school managers are expected not only to co-ordinate actions in schools, but also to ensure consistency and efficiency in attainment of the vision and mission of schools (Tomaney 1990). Covey (1989:188) also notes the golden eggs in well-managed schools are the effectiveness and positive interaction with educators. It goes without reason that to get golden eggs on a regular basis, school managers may be required to take care of the geese by forging long lasting and genuine partnerships with educators. However, Covey

(1989:189) also notes that lack of empathy with educators' situations may lead to the fight or flight responses which may be typified by verbal battles, slammed doors, refusal to communicate, emotional withdrawal and self-pity. Table 3.4 indicates leadership dimensions that may enhance educators' motivation.

Table 3.4: Proposed Leadership Dimensions and Descriptions

Systems orientated leadership	Person orientated leadership
Production emphasis: applies pressure for productive output	Tolerance of freedom: allows educators scope for initiative
Initiation of structures: defines own role clearly and lets followers know what is expected	Tolerance of uncertainty: is able to tolerate uncertainty and postponement without anxiety or upset
Representation: speaks and acts as representative of a group	Consideration: regards the comfort, well-being, and contributions of subordinates
Role assumption: actively exercises leadership role rather than surrendering leadership to others	Demands reconciliation: reconciles conflicting demands and reduces disorder in the system
Persuasion: uses persuasion and argument effectively, exhibits strong convictions	Predictive accuracy: exhibits foresight and ability to predict outcomes accurately

Adapted from Dawson (1993).

The above-listed factors in the Table 3.4, provide the basis for effective management in order to business discipline in schools. It is assumed that when school managers are concerned with attainment of superior quality and services they would attempt to resolve interpersonal conflict between management and staff. For this reason, Wanjui (1987:128) concludes that school effectiveness would be attained when there is stability in a school and when all educators agree to do the job well first time around. Green (1987:52) also notes the following elements of organisational effectiveness:

- Cost control since other things being equal, holding down the cost of achieving a defined tasks is efficient because it saves on the use of scarce real resources;

- Value for money in respect of inputs because all expenditure is effective and efficient in terms of the quantity of relevant inputs secured;
- Value for money in terms of outputs to ensure that any given results is as great a production of the output specified in quality as well as in quantity terms as possible; and
- Value for money in terms of goal achievement to ensure that the formal output quality, quantity and the mix of both quality and quantity are efficacious in achieving goals they are supposed to attain.

Against the background of the preceding statement it may be construed that Green is of the opinion that the quality of products cannot be separated from effectiveness and competitiveness of a school in meeting its targets. However, the elementals of business discipline flourish under favourable conditions, and these elementals promote creation of empowering environments for effective task performance.

#### 3.4.2 Team-building for organisational development

In present-day production systems teams and work groups have become prominent production cells in self-managed departments. According to Werner (2002:373), group cohesion and teamwork allow greater popular participation and increase performance in schools. However, it is necessary to understand that teams develop their own practices, values, practices and social relations that may pose new challenges for the way people are managed in schools. According to Hoy and Miskel (1991:206), since a team develops a culture that serves as a normative guide for group behaviour, management should play a supportive role in order to ensure that the group does not work against the culture of the school.

Nevertheless, Werner (2002:373) recognises the essence of team building in an organisations when he indicates that a team:

- has a mutual goal or objective;
- works conscientiously towards achieving its goal or objective;
- ensures that its members relate to each other; and
- encourages its members to have expectations about each other.

The foregoing discussion by Werner submits that norms play an important role in team cohesion. In the light of the preceding statement, the school manager's role is to coach, stimulate, direct and co-ordinate team and individuals to attain designated tasks and organisational goals as effectively as they possibly can (Dawson 1993:117). On the other hand Mabale (2004) notes team-building enables educators to be actively involved in monitoring their production and evaluating the quality of their products. In the same vein, Werner (2002:364) states the following points about a team in organisational development:

- It establishes a sense of understanding of the need for commitment to organisational missions;
- It articulates a vision for the organisation;
- It formulates structures to foster full participation of all people involved in the organisation;
- It sustains the culture of continuity; and
- It evaluates the process of development on a periodic basis.

It is noted that work groups or teams are effective only if the spirit of cooperation and collective action is enhanced in the school. In a dynamic organisational environment – where commitment and productivity are expected – school managers should ensure that teams and groups do not degenerate into cliques wasting time on unproductive and self-defeating conflicts (Sono 2002). On the other hand, team members' commitment to, and involvement with the success of the team is reflected by high morale and loyalty to an organisation (Hoyt

1991:215). To this end, Holpp (1999) notes the significance of team building when he states that:

... a means for involving team members as business partners in determining organisation success or failure... the real essence [of that] comes from releasing the knowledge, experience, and motivational power that is already in people but is being severely under-utilised.

It is apparent that in the preceding discussion Hoyt and Holpp assume that as team cohesion is forged, team members realise that they can help and support each other not only in achieving common organisational goals, but also to develop their latent talents. There is a close link between teamwork and talent creation in a school.

### 3.5 TALENT CREATION

In recent years talent creation has become a fundamental necessity for organisational development and competitiveness. Notably, one of the greatest threats to more established companies is the talent arbitrage opportunity available to new entrants in business (Hagel 2003:4). For example, the new entrants are often able to lure talent from mature companies by offering them more opportunity for value creation and talent development. On the other hand Sacht et al. (2003:6) note that one of the more positive findings of the Beehive Survey is the fact that compared to the other dimensions in the Beehive Model, talent creation is being actively pursued in South African organisations. For example, the average score of 56% on talent creation is the second highest scoring dimension in the Beehive Survey (Sacht et al. 2003:6). Nevertheless, this score is still close to 30% lower than those of globally competitive organisations, and Sacht et al. (2003:7) note that this – coupled with inadequately defined and aligned performance standards and targets – may well provide an explanation of why South Africa as a country scores so low on the various competitiveness

indexes published annually (as measured by the Global Competitive Beehive Survey).

Indubitably, to compete in world markets and to gain domination in global trade, South African industry needs highly skilled employees (Hall 1999). The need for skills and talent creation is necessitated by the high premium placed on effectiveness and competitiveness in present-day organisations. Against this background, D'Annunzio-Green & McAndrews (1999:2) note that talent hunting has become a top priority in production systems due to the requirement for the need for a highly skilled workforce in an organisation. In essence, with the onset of globalisation talent creation has become a non-negotiable priority in most countries (Sacht et al. 2003). International trends that necessitate talent creation in the South African context are:

- globalisation and the need for acquisition of international skills and experience that are appropriate for a developing milieu;
- outsourcing and the growth of the small business sector and entrepreneurship;
- the need for customer focus and the development of the service industry; and
- strategic alliances and cooperation in multinational and international organisations (Rainer 1999:9).

Rainer's views on the rationale for talent creation in South Africa is linked to the need for competitiveness in present-day organisations. Van der Westhuizen (2002) is of the opinion that to be competitive in the global arena, and to provide citizens with a better quality of life, organisations should play an active role in equipping people with a whole range of skills, qualities and experiences appropriate to meet the demands set out by globalisation. Rainer (1999) concedes that present-day workplace practices and expectations require the optimum development and utilisation of people's talents to optimise their ability to

contribute to the competitiveness of organisations. Incidentally, talent creation is embedded within the overall aims of outcomes-based education [OBE] (Department of Education 1997:11).

### 3.5.1 Talent as an elusive and scarce commodity

The quest for talent creation is based on the premise that the degree and type of potential that each person has differ remarkably, and in most cases only a few people utilise or develop their full potential (Dreyer 1994). The challenge posed by Dreyer in the preceding statement is that of optimum development and unfolding of people's latent talents and potential. It is an unquestionable fact that present-day organisations need workplace practices that develop talents and potential to ensure that employees contribute to the maximum market competitiveness of organisations (Vaida 2003). Surely, this obliges organisations to participate in talent creation not only to generate flexible specialisation, but also to assemble a combination of general-purpose equipment and skilled adaptable employees. Hagel (2003:1) notes that the growing importance of knowledge capital leads to a conflict between investors and talent for capturing economic value. The need for specialists, professionals as well as a literate and numerate workforce for competitiveness in the global marketplace also accentuates the urgency for utilisation of talents in present-day societies (Mathibe 1998).

From the preceding discussion it may be deduced that present-day societies presume that the competitiveness of organisations depends on searching for unique traits and talents and developing them. However, talent creation usually leads to proliferation of meritocracy and elitism in production systems (Mathibe 1998). According to Hagel (2003) the challenge for school managers is not only to acknowledge that educators have diverse talents, but also to ensure that these

talents are unfolded. There is a link between talent creation and utilitarianism and functionalism in organisations.

### 3.5.2 The rise of a utilitarian and functionalist approach to education

According to Van Rensburg (1990:107), the formal sector in present-day societies is typified by large-scale investments, modern technology and the quest for high productivity. This necessitates creation of reciprocal developmental systems that would imbue employees with appropriate skills for efficiency in a high-tech labour market (Leyshon 1996). It is argued that growth increases the value that talent can add to business, thereby increasing the potential for talent utilisation in a variety of ways (Hagel 2003:2). In addition, Mathibe (1998) notes that in line with industrial needs for productivity and competitiveness, the acquisition of required competencies and skills is the *sine qua non* for task performance in production systems.

A functionalist approach to education is linked to the concept of multi-skilling and ingenuity in high-tech labour markets. Multi-skilling is the buzzword in many progressive organisations since it is assumed that it generates a highly developed form of work intensification, flexibility, inter-changeability and mobility of employees (Tomaney 1990:37). In addition, Hagel (2003:2) notes that the quest for global competitiveness accelerates the development of new skills, accentuates exposure of talent to a broader range of experiences in a short time and it demands that in-house talent be given an opportunity to work with talent coming from outside the organisation. It would appear that in order to correct imbalances in the educators' output and productivity, schools should generate and nurture flexibility in the educator corps. In this context Mason (1998) notes that talent creation should promote acquisition of diverse skills and knowledge in order to ensure adaptability of educators to idiosyncrasies of present-day schooling.

From the preceding discussion it seems obvious that talent creation may assist a school to retain its loyal educators who under some circumstances could have been redundant. In addition, talent creation may save a school a lot of money since skills are generated within the school rather than being sought from people not linked with the school (Werner 2002a). In view of functionalism, the researcher is of the opinion that efficiency and sustainability in schools should be perceived symmetrically to the utility and functional value of educators in ensuring effective teaching and learning. Invariably, being a school manager in this situation requires that one identifies skill gaps in the school and channel some of the educators to acquire skills that are scarce in a school.

### 3.5.3 Enhancing talent creation

In today's competitive knowledge-based world, acquisition and creation of talent increasingly determines success of organisations in the global marketplace (McKinsey & Company 2001:3). It is also noted that attracting and retaining talent is becoming difficult as the need for highly skilled personnel outstrips their supply. According to Rothwell (2003:18), one place for looking for talent is within the very group-retiring workers who contribute to talent shortage in the first place. Apparently, what Rothwell suggests is managing the retiree base so that rather than losing retiring employees an organisation keeps them as consultants and this can be ensured by:

- Turning them into coaches for their successors;
- Keeping them on-call and encouraging over-the-phone coaching;
- Allowing them to do virtual work for the company; and
- Keep in touch with them and be informed about the new skills they acquire (Rothwell 2003:18).

Distinctly, in the preceding discussion Rothwell suggests that organisations maintain relations with retired employees in order not to lose their experiences.

skills and expertise. On the other hand, McKinsey & Company (2001:6-8) present the following five essentials for successful talent creation and development:

- Instil a talent mind-set: build a management talent pool to achieve the aspirations of the company;
- Create a winning employee value proposition [EVP] that brings scarce talent through the doors and keeps them there: make the work exiting, create a conducive environment for talent development, provide reward and incentives, develop trust;
- Recruit great talent continuously;
- Grow great leaders; and
- Differentiate and affirm.

It is noted that McKinsey & Company's view of talent creation is linked to the creation of a favourable environment for talent development inside the organisation. In the same vein, schools should develop programmes to promote the nurturing of personnel's talents and latent potentials. The following discussion will indicate that there is a link between talent creation and attainment of organisational strategies.

### 3.6 ORGANISATIONAL STRATEGY

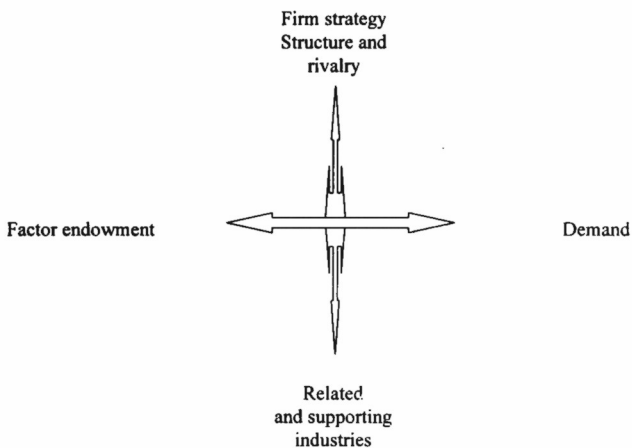
With the onset of globalisation it has become necessary for organisations to redefine their operational strategies (Mason 1998). According to Werner (2002), in many present day organisations it has become imperative that employees feel that they influence organisational strategies in order to perceive themselves as worthy members of an organisation. On the other hand Sacht et al. (2003) contend that the Beehive Survey examined organisational strategies from two perspectives namely: through the process by which strategy is formulated and through processes through which strategies are used as primary drivers of performance in South African organisations. The data generated from the Beehive Survey

indicated that respondents rated this dimension in the middle with an average score of 51%, which is well below (30% lower) that of South Africa's globally competitive counterparts (Sacht et al. 2003).

Sacht et al. (2003) note that the findings indicated in the preceding discussion, coupled with low ratings on how to translate strategy into tactics at operational levels of organisations, do not auger well for entrenching high performance in South African organisations. On a lighter note, Dawson (1993:271) observes that organisational strategies should revolve around a school's strategic objectives or missions. Surely, organisational strategies are essential not only for ensuring the achievement of organisational objectives, but also to streamline operational plans (Robinson 1992). In the same vein Vaida (2003) notes that participation of employees re-formulation of organisational strategies is essential for their commitment to the organisation. Surely, popular participation in formulation of a school's strategy should promote the credibility of the school's plans and operational strategies.

Against the background of the preceding discussion Werner (2002) notes that an organisational strategy that has been negotiated, and not imposed on people, promotes result orientation; the ability to participate fully with people at all levels; and the willingness to learn, adapt and grow. From what Werner suggests in the preceding discussion one may conclude that a school manager should use a school's strategy should develop commitment to its strategy, purposes and operational plans. In the same vein, Figure 3.2 presents an outline of attributes that may inhibit or promote an organisation's competitive advantage.

Figure 3.2: Determinants of competitiveness



In the preceding Figure 3.2 factor endowments refer to factors of production such as appropriately skilled workforce and infrastructure. According to Nkopodi (2002), managers have a role to play in upgrading the factor endowment in organisations in order to respond aptly to the demands of the market. It is also evident that organisational strategies should be developed with apposite appreciation of the input of related and supporting industries. Incontestably, the preceding discussion intimates that organisational strategies should provide for creation of feedback loops (Sono 2002). It is eminent that feedback loops ensure establishment of communication channels to facilitate continuous two-way information sharing between the organisation and stakeholders (Hoy & Miskel 1991:353). Sustaining the argument for feedback loops, Dawson (1993) observes that educators need feedback from their managers in order to assess their success rate and productivity. Likewise, schools need feedback from its clients about the quality of its products. It is concluded that internal feedback loops indicate the

relative level of goal achievement, while external feedback ensures that the community and other clients evaluate the quality of products (Hoy & Miskel 1991:414).

The following discussion focuses on the essence of planning in implementation of organisational strategy.

### 3.6.1 Planning and organisational strategy

Planning is not only the point of departure for management; it is also an essential component of elements for effective leadership. Accordingly, Dawson (1993:271) concludes that without appropriate planning an organisation can have no purpose and rationale upon which to decide on how resources are to be allocated. Furthermore, without planning an organisation would not be able to determine the degree of its successes and challenges for improvements of its operations. It seems appropriate therefore to regard planning as a management and leadership task that determines what the institution wishes to achieve and how it intends to achieve its goals (Van der Westhuizen 1999).

It is acknowledged that development planning includes identifying management and leadership objectives, the way in which these objectives should be attained as well as the involvement of all role players with the attainment of those objectives. According to Hargreaves and Hopkins (1991:78), outcomes of appropriate planning are:

- improved understanding, communication and cooperation among stakeholders;
- better staff development that links professional development with organisational improvement;
- raising of expectations about what ought to be achieved and what can be achieved;

- growing commitment to improving quality; and
- greater confidence of stakeholders in the work of a school.

In addition to what Hargreaves and Hopkins propose in the preceding discussion, the power and ability of the school managers to extrapolate and forecast alternative futures are significant for strategic planning and organisational development. Strategic planning, according to Toffler (1980), should assist the schools to avoid the so-called future shock that characterises changes in production systems. A developmental plan per se enhances the quality of production in a school and consequently, Hargreaves and Hopkins (1991:6) list the following advantages of a school's development plan:

- Focusing attention on the aims of education, especially learning and attainment of outcomes;
- Providing a comprehensive and co-ordinated approach to all aspects of planning covering curriculum, assessment, teaching, management and leadership, schools, finance and resources.
- Capturing the vision of the schools within manageable short-term goals;
- Assisting to relieve the stress on educators caused by the pace of change since they exercise greater control over change;
- Improving the quality of educators development models; and
- Making reporting on the work of the school easier.

From the preceding discussion of Hargreaves and Hopkins it is evident that developmental planning allows and enables the school to focus on achievement of its fundamental aims and strategic objectives. As a result, Dawson (1993:248) concludes that effective planning should entail setting up of quality assurance indicators and techniques since avoiding poor quality is a much more effective production strategy than its rectification. It is acknowledged that in order to ensure quality in production, school managers are challenged to adopt appropriate

performance standards when organising roles, functions and activities in a school (Van der Westhuizen 1999).

### 3.6.2 Organising and organisational strategy

Van der Westhuizen (1991:227) is of the view that organising is concerned with the task of bringing about order and orderly structures in a school. Organisational structures do not only ensure subordination (obedience) to the law enacted for a specific task, they also indicate the need for effective utilisation of skills diversity and mixes in a school (Dawson 1993). It is acknowledged that organising is a dynamic process that consists of a series of actions that have to be performed as indicated by the following:

- It is about grouping of tasks and the division of work;
- It is concerned with allocation of duties, authority and responsibility without abdicating responsibility;
- It determines relationships between people, departments and promotes collaboration and coordination; and
- It is concerned with a common effort to achieve goals (Van der Westhuizen 1999:163).

Van der Westhuizen's explanation of functions of organising implies that it [organising] ensures not only division of work in a school, but it also promotes effective attainment of organisational goals. On the other hand Dawson (1993:207) notes that organising may be done in relation to market segments or in relation to products. It is thus acknowledged that when organising focuses on job allocation and creation of structures within schools it promotes the assumption that skilled personnel should be engaged and apportioned appropriately in order to amplify product quality. In this context, Waters (1998) notes that organising ensures the following:

- Focusing on deliverables more than on doables;

- Realising that human resources management and leadership are not only for human resource managers;
- School managers are able to take risks;
- School managers enhance and embrace intellectual capital; and
- Customer satisfaction is acquired through quality products, service-orientation and fair compensation.

The preceding discussion indicated that Waters is of the opinion that effective organising promotes customer satisfaction and employee creativity. Conversely, Dawson (1993:127) notes that effective organising ensures provision of adequate mechanisms to enhance relationships between management and subordinates. On the flip side of the coin, Robinson (1992) cautions that a school that attracts the wrong type of educators would not achieve its objective of efficiency as it might. It is lucid that managers should engage the 'right' educators for the job, and provide thus 'horses for courses'. Robinson's observation creates an impression that poor workmanship and production of substandard commodities may be ascribed to engaging the wrong employee for the job. While two wrongs do not make a right, some school managers may try to cover up for poor quality in their schools' products, and consequently Argyris (1989) states that:

... designed error is dangerous for several reasons. First, it violates the most fundamental features of managerial stewardship. Second, it is frequently covered up. Third, since cover-up also violates managerial responsibility, the cover-up is covered up. Fourth, designed errors become part of an underground culture that is not discussable, and its undiscussability is not discussable. Fifth, it is difficult to manage cover-ups and undiscussability by most known, rational methods since they depend on discussability that, in turn, violates cover-up...

It is evident that school managers should be accountable for the quality of the school's products. The researcher observes that just as organising is an important factor for organisational effectiveness, there should be reciprocal control processes to assure and insure the quality of products.

### 3.6.3 Control and organisational strategy

It is essential to understand that control is exercised to determine if tasks have been performed in accordance within the framework of objectives. Van der Westhuizen (1999:217) defines control as a school manager's means of checking up if the work is done correctly. It is also noted that control is used to assess effectiveness in implementation of an organisation's plans, to evaluate the underlying principles for planning, and if necessary to make the necessary adjustments to the plans. Furthermore, the manager may use control measures to ensure that inputs are optimised and that outcomes are commensurate with the organisation's vision and mission (Robinson 1992). Accordingly, Dawson (1993:282) avers that control is based on the assumption that managers have a reasonable and clear view of what the organisation wants to achieve, and with assessment they check if organisational objectives have been achieved. It is noted that just as control assists the manager to supervise subordinates' tasks, it involves three steps namely:

- establishing standards or performance indicators;
- measuring performance against the standards; and
- correcting deviations from standards and plans (Orsborn & Moran 2000:538).

From Orsborn & Moran's line of reasoning it appears that in schools control affects production in the sense that educators are encouraged to perform their work prudently in order to achieve set standards. In the same vein, Dawson (1993:283) contends that many organisations employ quality control personnel and build in quality control measures within responsibilities of production personnel in a quest to promote quality assurance at the shop floor. In parallel disposition, one may conclude that the quest for quality in education necessitates that school managers devolve responsibility for quality assurance to departmental

heads or phase HoDs. It is in this context that Marx (1981:290-291) states that control may be done in three interlinked ways namely:

- Prior control that is related to formative evaluation. For example, guidelines, budgets, division of work and job descriptions are made before starting the work;
- Progress control that is related to process evaluation. For example, visual control is exercised and supervisors are used; and
- Summative control is conducted at the end of the task. For example, the information gathered from summative control is invaluable since it may be used for readjustment of the study programme and for future planning.

It would appear that Marx promotes the link between control and reflexive management. Reflection is necessary for assessment of daily activities in order to ensure that intervention strategies are introduced promptly and before too much damage – which may reverse production of quality results – is done by staff members (Hargreaves & Hopkins 1991:21). Surely, prompt action to correct poor quality of products leads to customisation of work processes with standards of quality production. According to Gronn (2003:71), the outcomes of customisation and regulation of educational practices are reprofessionalisation of production identities that are aimed at intensification of practice. In the same vein, effective control is typified by timely, precise and reliable feedback (Dawson 1993). It appears that organisations should have monitoring instruments and structures in order to constantly evaluate the quality of their products. Table 3.5 shows criteria for effective education management and control.

Table 3.5: Criteria for the Control Process

Economic	Control mechanisms produce better value for money. In all probability they keep to the minimum demands on employee
Appropriate	Control mechanisms are directed to the high-risk areas. Ensuring fit for purpose
Simple	The message obtained from the control process should be clear and easy to understand
Timely	Information that is required should be produced at an appropriate time for remedial action to be instituted

Source: Dawson (1993:289).

From the preceding Table 3.5 it is evident that control is linked to improvement of quality in a school by providing economic, appropriate, simple and timely intervention. It is noted that for control to be efficacious, there is a reciprocal need for guidance in an organisation.

#### 3.6.4 Guidance and attainment of an organisational strategy

Guiding is an act of influencing through which a manager constantly inspires, guides and equips followers to fulfil their roles (Van der Westhuizen 2002:187). Van der Westhuizen's view of guidance is linked to the assistance that is provided to subordinates to understand and work prudently for the achievement of the organisation's vision and mission statements. As it appears guidance is an inherent part of the manager's authority and tasks, and Gomez-Mejia et al. (1998:219-223) list the following characteristics for the act of guidance in an organisation:

- the manager and subordinates should explore causes of problems;
- management and subordinates should direct attention to the causes of problems;

- management and subordinates should develop action plans collectively;
- subordinates should be equipped to reach solutions to problems; and
- communication between management and subordinates should be directed at improving performance in an organisation.

It would appear that Gomez-Mejia et al. are of the view that guiding ensures collective action in an organisation and it also promotes mutual trust and respect between management and the entire workforce. One way of providing guidance in an organisation is through purposeful examples in job performance (Mabale 2004). Robinson (1992:259) concurs that the feedback that educators receive from the school manager may influence their behaviour. Subsequently, self-fulfilling prophecies and the negative feedback from significant others tend to reproduce themselves in how people perceive themselves as good or bad (Khoong 1990). In the preceding statement Khoong seems to suggest that a manager who guides subordinates patiently, and also provides them with encouragement would generate a workforce that is eager to learn.

One of the most important aspects in emergent and budding organisations is of appropriate guidance for optimum utilisation of human potential (Mabale 2004). According to Khoong (1990:387), guidance is the human factor that directs an educational institution towards realising definitive objectives through the cooperation, and voluntary efforts of all the educators in the school. It is noted that effective leaders provide guidance to subordinates in order to sustain innovation since it is the heart of capacity building for organisational development (Harris & Day 2003:89). However, very often the school succeeds or fails to optimise potential due to the presence or absence of good leadership and guidance. Dawson (1993:54) also contends that by explaining to subordinates why certain decisions are taken or functions are performed, the manager would guide

educators to an understanding of operational plans in the school. The advantage that Dawson distinguishes from the guidance referred to in the preceding statement is that no resentment is encountered when there is genuine communication between management and educators. Table 3.6 as adapted from Robinson (1992) provides essentials for guidance in an organisation.

Table 3.6: Essentials for effective guidance in an organisation

Communicating	The effective manager keeps his or her team members up to date with developments in an organisation on a regular basis.
Problem solving	The effective manager makes himself/herself available and is responsive to his/her team members' concerns and problems.
Team development	The effective manager develops a balance of advisers, organisers, explorers and controllers in a team.
Horses for courses	The effective manager allocates work in ways that match staff members' capabilities and preferences.
Valuing differences	The effective manager encourages respect, trust and understanding between team members.
Work standards	The effective manager sets realistic standards and goals for subordinates. Subordinates are clear about the high standards that are expected from them.
Participative decision-making	When it is appropriate the effective manager makes sure that she/he involves team members in those decisions that would affect them and their performance.

From Table 3.6 it appears that the effective manager empowers teams working under her or his leadership by delegating to them as much authority as possible. On the other hand, it may be concluded that a manager bridges the gap between where the school is at present and where it would be in future (Nelson 2000). Guidance in this respect does not only ensure an understanding of the present conditions in an organisation, it also directs subordinates to work towards sustaining the competitiveness of the organisation. As a result, Hargreaves and Hopkins (1991:20) list the following characteristics for systematic guidance in an organisation:

- inspiring commitment to the school's mission which gives direction and purpose to its work;
- coordinating the work of the school by allocating resources, roles and delegating responsibilities within structures that support collaboration between the schools and its partners;
- being actively and visibly involved in the planning and implementation of change;
- emphasising quality and enhancing realistic expectations in the work roles; and
- being enthusiastic about change and innovation, but judicious in controlling the pace of change.

Plainly, Hargreaves and Hopkins's views encapsulate the essence of guidance in a school by emphasising that managers should forge commitment to the school's vision and mission. The researcher observes that when educators are not committed to the vision of a school, they do not only become a burden of deadwood that the school lugs, they also become stumbling blocks to change in a school. Definitely, there is a link between guidance and establishing functional structures in schools.

### 3.7 FUNCTIONAL STRUCTURES

Present-day organisations need to make the most of their supply chains as well as to make individuals accountable for their actions at the workplaces (Robinson 1992). It is noted that in order to ensure effective attainment of organisational strategies and visions structures need to be created, supported, empowered and sustained. In this respect, Van Dyk (2002:62) notes that compensation systems, policy units, and human resources departments are some of the structures that serve specific functions in organisations. In the same vein, Dawson (1993) notes structures should be initiated on the basis of clarity of roles and empowerment of

people in order to an organisation's strategy operational. In parallel disposition, Sacht et al. (2003) note that in the Beehive Survey the overall score of 52% indicated that South African organisational life is not geared to senior management 'walking the talk' and facilitating, or helping their management teams to translate strategy into day-to-day tactics.

The low scores generated on 'structures' in the Beehive Survey indicate that South African organisations are viewed as having a traditional top-down management system with little room for employees at operational levels to make contribution to strategy implementation (Sacht et al. 2003). It is observed that when roles and responsibilities are diverse, there is no alternative but to have reciprocal structures to ensure that people are accountable and responsible for taking decisions in the roles they are employed to fulfil (Robinson 1992). As a result of Van Dyk and Robinson's assertions it is apparent that organisations need frameworks, policies, systems and strategies in order to establish structures within which roles and responsibilities are fulfilled. Bush (1995) lists the following points about structures:

- For any organisation there is a structure appropriate to the goals, the environment, the technology and the participants;
- Specialisation permits higher levels of individual expertise and performance;
- Coordination and control are accomplished best through the exercise of authority;
- Structures can be systematically designed and implemented; and
- Organisational problems usually reflect weaknesses in an appropriate structure and can be resolved through redesign and reorganisation.

Unmistakably as a manager sets the tone of the organisation and enhances the level of professionalism and morale in subordinates, structures in an organisation are the sum total of the way in which labour is divided (Mintzberg 1992:24). Gaziel (1992) is of the opinion that within the notion of structures, the scope for structural effectiveness provides service utility. It is observed that structures do not only reflect the leadership style used in the organisation, they also dictate the level to which an organisation may effectively attain its goals (Robinson 1992). One may conclude that organisational structures ensure effective public relations since they improve the public image of the organisation. In addition, structures promote feedback loops and extend opportunities that encourage feedback from clients (Van Dyk 2002:84). It may be concluded that structures guarantee adaptability of organisations to prevailing situational needs and changing market-related challenges.

### 3.7.1 Effectiveness of structures in organisation development

Effective organisations are typified by highly organised structures and high productivity (Van der Westhuizen 1999). Accordingly, Hoy and Miskel (1991:382) note that competitive organisations adapt their structural operations and productive capacity to the needs of their environments and their constituencies. In the light of the preceding statement Warner (1997) notes that effective organisations are characterised by structures aimed at:

- Getting things done on time;
- Staying close to the customer;
- Promoting autonomy and entrepreneurship;
- Maximising productivity through people;
- Using a hands-on approach to leading;
- Doing what the institution does best;
- Maintaining lean structures; and
- Promoting both centralisation and decentralisation simultaneously.

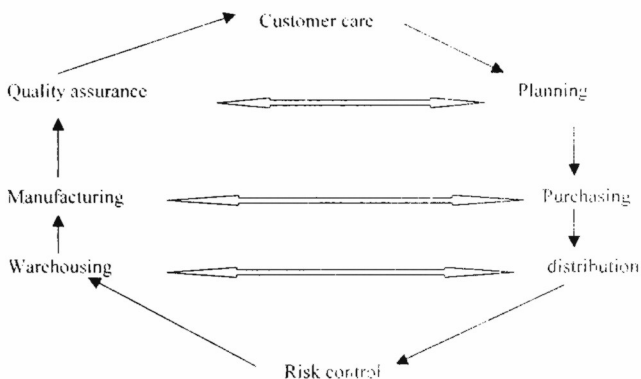
In the preceding discussion Warner notes that the impetus for organisational adaptation and adaptability to social environments is necessitated by the need for innovation, development, growth and expansion. Competitive organisations demand structural commitment on the part of management, subordinates and stakeholders to inculcate the organisation's norms and values (Charlton 2000). To this end it may be argued that the manager should ensure that the organisation serves the needs of the stakeholders without favouritism or victimisation. To achieve this lofty goal, the organisation should have relevant structures to collect the stakeholders' needs, to process them, and to turn them into attainable plans.

### 3.7.2 Structures, commitment and organisational development

Hoy and Miskel (1991:382) contend that typical indicators for effectiveness of structures in performing their functions include loyalty and interest in an organisation's business. It is observed that one of the hindrances to effective organisational improvement is from within the ranks of subordinates who have created comfort zones for themselves in organisations. As a result of feeling too comfortable in their work, some subordinates resist all forms of changes in organisations since they do not want to lose their 'comforts'. To this end, Sacht et al. (2003) contend that even after concerted efforts to introduce changes and high performance practices are made, most Old Economy organisations regress to operations that are similar in nature, if not in form, to the way things were done before new challenges and opportunities surfaced.

Doing things the way they have been done before does not only indicate personnel's inclination to traditions, it also indicates lack of relevance and creativity that evolve in every eon of human existence. Figure 3.3, as adapted from Van Dyk (2002:85), depicts the functioning of structures in an organisation.

Figure 3.3: The functioning of organisational structure:



From the preceding Figure 3.3 it is construed that organisational structures should address 8 major functions namely: customer care, planning, purchasing, distribution, risk control, warehousing, manufacturing and quality assurance. It would appear that the variety of functions performed in an organisation need reciprocal structures to implement appropriate service delivery mechanisms. Robinson (1992) presents the following points as being fundamental for an effective matrix of management and leadership structures:

- Flexibility in confronting and managing change;
- Enhanced motivation and commitment to the achievement of cross-functional programme aims and objectives;
- The opportunity to share and to integrate the technical resources and other specialisms from several functions of several programmes;
- The possibility of reducing functional narrowness and developing broader perspectives among subordinates;

- The creation of opportunities to delegate project responsibilities within a programme framework;
- The creation of opportunities to develop cross-functional or multi-disciplinary teams; and
- The creation of opportunities to broaden and develop subordinates by exposing them to broad issues of critical management and leadership concern across the whole organisation.

It suffices to state that according to Robinson managers are challenged to establish functional structures in order to maintain the competitive edge of their organisations. Robinson seems to assume that effective management enables subordinates or teams to succeed when they are given quality service by other structures in the organisation. While structures are essential for organisational competitiveness, Bush (1995) notes that:

... structuralists tend to see organisations as relatively closed systems pursuing fairly explicit goals. Under those conditions, organisations can operate rationally with high degrees of certainty and predictability. If organisations are highly dependent on the environment, they are continually vulnerable to environmental influences or interferences. To reduce their vulnerability a variety of structural mechanisms are created to protect central activities from fluctuation and uncertainty.

From Bush's point of view one may deduce that there is a need for different structures in organisations to assist a manager to effectively oversee the organisation as a whole. Bush (1995) notes that managers need consent of their colleagues if policy initiatives are to be carried through into classroom practice. Apparently, a manager should encourage cooperation between all structures in the organisation in order to increase opportunities for cooperation and collective action. There is a mutual interdependence in structures within an organisation and it is management role to ensure that these structures do not develop into islands or clubs that compete for power (Dawson 1993). It would appear that Dawson suggests managers should create a climate and culture for success in organisations

by ensuring that there is room for self-expression, creativity, communication, and motivation in all structures.

There is a link between structures and enhancement of motivation of personnel through pay and incentives.

### 3.8 PAY AND INCENTIVES

Saecht et al. (2003) contend that the Beehive Survey sought to assess the degree to which pay and incentive systems were aligned to attract, retain, and enhance the commitment of employees across all levels in South African organisations. The Beehive Survey found out that whilst over 60% of the organisations recognised that pay is just one way to motivate employees, less than 40% created long-term incentives across all levels (Saecht et al. 2003). Again, Saecht et al. (2003) note that the pattern of low scores for 6 out of 8 of the pay and incentive questions paints a gloomy picture of how these performance levers are under-utilised when it comes to the strategic management of individual and/or organisational performance. According to Hoy and Miskel (1991:190), incentives are given in order to motivate employees to improve their work performance. One may conclude that Hoy and Miskel's assertion is linked to behaviourist theories that propound that incentives ensure the repetition of desired behaviour or performance.

Inadequate monetary benefits may lead to discontentment and disenchantment that are typified by substandard work and a poor work ethic (Dawson 1993). If this is the case, the Stimulus-Response characteristic of pay and incentives suggest that a well-paid workforce would be committed to organisational strategic objectives and vision. For this reason, the Salary Moves and Labour Trends Beehive Survey – conducted by Deloitte and Touche in South African organisations in 2007 – indicated that labour turnover as a result of dissatisfaction with salaries, and

incentives was 15% among key specialists and 17% for general monthly paid employees (Brindle 2003). Vaida (2003) notes that high salaries and incentives offered by organisations contributed to employee satisfaction and retention of specialist staff. The researcher is of the opinion that in situations when employees are more interested in the monetary benefits of employment there is a danger that low salaries may be a cause for discontentment.

There is a relationship between pay and incentives and cognitive dissonance theories (Mabale 2004). According to Hoy and Miskel (1991:394), cognitive dissonance theories propound that productivity is related to the perceived difference between what is expected or desired as fair and reasonable reward – individual motivation and what is experienced in the job situation – the real organisational incentives. There are indications, therefore, that pay and incentives enhance employees' morale and motivation. According to Steyn (2002:86), morale is an elusive concept that is difficult to define but that has a strong influence on people's behaviour. Van Dyk, Nel, Loedolfe, Van & Haasbroek (2000:178) define morale as a state of mind encompassing all the feelings determined by the individual's anticipation of the extent of satisfaction of those needs that she or he perceives as significantly affecting his or her total work situation.

In addition, Evans (2000) defines morale as the state of mind encompassing all feelings determined by the individual's anticipation for the extent of satisfaction of those needs that are perceived to be significant. There seems to be no agreement on the real definition of the concept 'morale', but Steyn (2002) contends that morale is an extension of the concept motivation that also includes attitudes and feelings towards an organisation in general. The researcher is of the opinion that morale is linked to job specific factors such as salaries, job security and supervision may affect employee morale. In the following discussion the

researcher attempts to elucidate how pay and incentives may be used to better productivity in an organisation.

### 3.8.1 The link between pay and incentives and productivity in an organisation

According to Vaida (2003), just as incentives are used for staff retention, most organisations use incentives in order to reward outstanding employee performance, and also to sustain quality in production, efficiency in work processes and market competitiveness. Notably, specific incentives granted to organisations include money, power and idyllic treatments as well as general incentives that are non-material (Hoy & Meskel, 1991:190). However, it is cautioned that the system of incentives for good working habits may not only produce a highly competitive workforce, it has the potential of producing a workforce that gravitates for higher salaries and promotion without emphasising the social character of labour (Apple, 1982).

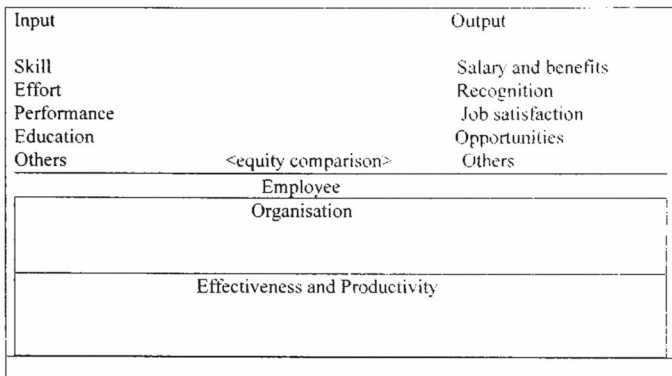
It is eminent to note that while one of the most important aspects of emerging and budding organisations is of utilisation of human potential (Mishak, 2004), pay and incentives are necessary for increasing staff retention rates. In this system, activities linked to pay and incentives include staffing, employee development, compensation, and appraisal (Van der Westhuizen, 1991:55). In addition, pay and incentives provide motivation that ensures the voluntary mobilisation of employees' talents and potential for the benefit of the organisation. Boyce (2002:333) states the following points on subordinates' level of motivation:

- Most subordinates feel that the salaries they receive are not fair to the amount of work they do;
- Subordinates who are facing the possibility of redeployment or involuntary redeployment or subordinates who are confronted with major changes in curriculum would experience insecurity and

- Subordinates feel that their working hours are unrealistic and unreasonable.

From Steyn's assertion it would appear that the commitment of subordinates to their work might be linked to the equity theory. It would seem appropriate thus to conclude that there is a link between pay and incentives and the equity theory. Figure 3.4 indicates the views of Draffe & Kossen (1998:288) on the equity theory.

Figure 3.4: The equity theory

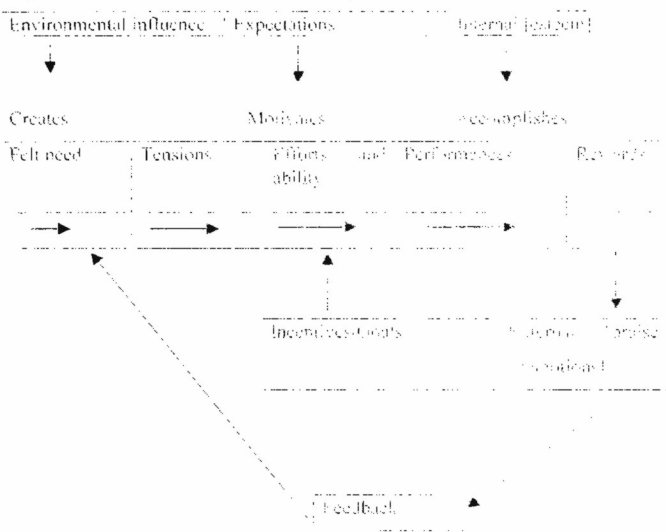


Adapted from Draffe & Kossen (1998:288)

From Figure 3.4 it would appear that the equity theory focuses on the concept of fairness. There is an inclination, therefore, to ensure that employees receive their fair share for input – aggregated as skills and effort – they make in their work in order to produce the expected outcomes [output] in the form of salary, benefits and job satisfaction (Draffe & Kossen 1998). Since motivation may be viewed in terms of energy and direction, the degree to which a person is motivated will influence the intensity with which a person pursues his/her plans. For this reason, Charlton (2000) notes that extrinsic and intrinsic rewards have reciprocal effects

on subordinates since they represent effective methods of generating and maintaining behaviour in an organisation. It is well supported that there are propounds that underperformance and undermotivation are a function of lack of motivators in organisations. Figure 3.5 as per Gilad (1998, 275) provides the motivational model of pay and incentives.

Figure 3.5: A motivational model of pay and incentives



From Figure 3.5 it appears that by offering rewards (e.g. salaries) to subordinates, the manager ensures that their abilities are blended with their efforts and level of performance. It goes without reason that motivation is probably the most important function performed by the managers and consequently, it is one of the most significant managerial jobs. Success in motivating employees is indispensable in the quest for organisational

full potential in order to ensure quality products and service (Robinson 1992). For this reason, Dawson (1993:61) regards motivation as the extent to which employees acknowledge the legitimacy of and seek to achieve organisational objectives and interests.

In the preceding discussion Dawson seems to put forward that pay and incentives are significant for motivation and boosting the morale of employees at all levels in an organisation. In view of the preceding statement one would be easily tempted to conclude that conditions are not favourable for a motivated educator corps in South African organisations due to long-working hours and disparities between energy invested in teaching and salaries paid at the end of the month. On the other hand Rainer (1999) notes that many educators with mathematics and science qualifications are employed in the private sector due to attractive salaries packages and incentives offered there. The researcher observes that using salaries and incentives may generate dissatisfactions in the workplaces, and consequently the following discussion focuses on ethical considerations when awarding incentives.

### 3.8.2 Ethical considerations in awarding incentives

According to Robinson (1992), effective motivation depends on a concern for ethical values when duties are apportioned, responsibilities are assigned, and formal operational relationships are forged. The preceding statement indicates that salary and incentive schemes should be well-planned, organised and controlled, in order to keep subordinates motivated to direct their energies into productive and rewarding activities. Characteristically, ambivalence about the rewards from an employment relationship may generate serious inconsistencies in the organisation since it is also the source of employee despondency and lack of motivation (Heystek 2002). Werner (2002:331) thus argues on the basis of the two-factor motivation theory when he concedes that it is an exigent assignment to motivate a

despondent employee. In the light of the preceding statement, it seems obvious that it is essential that management give attention to hygiene factors before introducing motivators into the employee's job. For example, there are indications that job enrichment – characterised by vertical loading of an employee's job to make it more challenging and interesting – may be used not only for providing growth and recognition to subordinates, but also for mounting the motivation intensity of the workforce (Werner 2002:331).

It is also noted that subordinates who actually understand their jobs may have greater job satisfaction than their colleagues who are sceptical about what they are doing. On the other hand, Dawson (1993:78) notes that even the most motivated employee would perform badly if he or she has no opportunity to perform effectively. Against the background of the preceding discussion one may conclude that when pay and incentives are used to reward only outstanding performance, then they would exacerbate discontentment in the workplace. Ostensibly, managers should create comfortable operational environments in order to ensure that subordinates perform to their potentials. Bussin (2003) highlights the following fundamentals for effectiveness of motivation through pay and incentives:

- Bonus schemes should focus on the achievement of specific short-term objectives and should be contracted at the commencement of the remuneration period. The scheme/s must drive the business strategy and objectives of the organisation. Therefore the organisation's bottom line performance in terms of profit and return on assets are of paramount importance;
- Bonus schemes must support organisation as well as divisional objectives. Whilst the performance criteria and measures should reflect this, individual performance should also be rewarded;

- Bonus schemes must motivate employees to achieve set objectives. To maximise incentivisation, communication with participants on progress relative to set targets must be regular and target setting must be relevant to the line of sight of participants;
- Bonus schemes and the concomitant targets should be simple, measurable, achievable (with an element of stretch), realistic and time bound;
- Bonus scheme eligibility should be fair and equitable within each job level. Where employees stand to gain differing amounts, these must be based on clearly evident, pre-determined performance measures and contribution levels in order to ensure defensibility;
- The incentive scheme must be self-funding;
- Individual bonus rewards should be uncapped (but subject to executive scrutiny); and
- The schemes should provide handsome rewards for excellent performance and penalise performance below on-target level.

From the discussion of Bussin it is lucid that the design of the incentive scheme must reflect sound corporate governance principles. In addition, the design of performance targets must be reviewed annually to reflect continuous improvement in line with shareholder expectations as well as changes to organisational strategy. Schultz (2004:277) lists the following tenets for dynamic compensation and incentive schemes:

- Pay is first and foremost a people issue: it is about motivating them, reshaping and refocusing their behaviours and accepting new values;
- Pay is a major organisational communication;
- No single pay structure is right for everyone;

- Pay must support – not lead – the organisation’s vision, values and business strategies; and
- Pay must be aligned with the organisation’s work culture.

In the preceding paragraph Schultz contends that there is a difference between public organisations such as the school and private sector organisations when determination of pay and incentives is made. However, with the introduction of IQMS there is room for school managers to use pay and incentives to recognise outstanding performance by dedicated educators, and to this end South Africa (2000) states:

... this implies a massive undertaking to rebuild the organisational systems and culture of the public service. It implies building a high quality public system with an emphasis on accountability, transparency and efficiency. The public Finance Management Act and the Public Service Regulations are important in this regard ...

Against the background of the preceding discussion it seems obvious that education managers should provide incentives for sustenance and maintenance of improved performance in schools. Having provided a discussion on pay and incentives, focus should be on change leadership.

### 3.9 CHANGE LEADERSHIP

According to Vaida (2003) change leadership involves excelling in the implementation of performance planning processes: communicating the rationale behind changes; adequately developing new skills across all levels of the organisation; a continuous evaluation of any resistance to change; assessing and responding to any problems; and an awareness of the consequences of non-delivery. In the same vein, the Beehive Survey assessed the degree to which South African organisations used proven leadership practices for implementing change as well as how business strategies were turned into operational plans that deliver outstanding performance (Sacht et al. 2003). However, Sacht et al. (2003) note

that the fact that South African organisations rated themselves only half as good as their global competitors when it came to embedding a change culture into their workplaces.

Change is endemic in organisational life, and Robinson (1992:293) notes that as trends come and go they are given a new life, decades apart, only to swing back again from whence they came. From Robinson's assertion one may conclude that life is typified by cycles of change that at times may be moderate, but which always have far-reaching consequences. It is apparent that changes experienced as a result of globalisation would also necessitate a new concept of pluralism and to achieve this, production systems are required to advance not only a new competitive thrust, but also promote respect for human rights (Akinpelu 1990). Evidently, there is a need for appropriate and relevant knowledge and skills to deal effectively with changes in the lifespan of an organisation (Sono 2002). The following discussion focuses on change management and leadership in organisations.

### 3.9.1 Change management and leadership in the school context

Change is not an event; rather it is a process that unfolds as individuals and organisations grow in their knowledge and as they experience change sooner or later (Mabale 2004). As a result, Werner (2002) notes that change management should involve excelling in implementation of processes aimed at minimising the effect of rapid changes in organisations. Against the background of Werner's assertion, it is apparent that managers should communicate the rationale behind changes as well as develop new skills across all levels in the organisation to assist employees to suffer from 'future shock' that typifies skill obsolescence in changing labour markets. Invariably, in many organisations there is a critical need to raise an awareness of consequences of management eccentricity in a changing

business environment (Vaida 2003). Change management should thus be viewed as a fundamental requirement for managing present-day and future schools. Noting the inevitability of changes in human beings' conditions Robinson (1992:203) states that:

... managing change in a proactive, continuous and evolutionary manner might enable schools to stay in tune with a dynamic environment, thereby avoiding (some of) the pain and disruption of a more reactive, acute and revolutionary catch-up effort...

Taking cue from Robinson's assertion in the preceding discussion, Ekins (1992:184) notes that the pace at which knowledge becomes obsolete in developing societies necessitates the transformation of educational institutions to function as centres that disseminate immeasurable volumes of information to diverse groups in a community on an on-going basis. In this regard, the education systems should address the need for the refinement of existing skills and the acquisition of new ones at the pace at which scientific and technological developments occur (Mason 1998). Similarly, Mathibe (1998) notes that the dualism of change management originates from the fact that just as change is simultaneously a highly personal experience, it is embedded in the structure, norm, and idiosyncrasies of schools.

Noting the essence of change management, Robinson (1992:303-304) rightly observes that change is not something that the schools did last 'October', but it is an essential characteristic for continuous development in schools. Within this context, managers should challenge the process of change by confronting and changing the status quo in schools by searching for new business strategies and opportunities, as well as learning from mistakes and successes of other schools (Van der Westhuizen 2002). In the same vein, Sono (2002) provides the following points for implementing change successfully:

- People in an organisation must feel the pressure in order to be ready for change;

- Participation and involvement of people to re-examine problems and practices is necessary to build commitment to change;
- New ideas or concepts must be brought forward from the outside to assist people in the organisation to find new approaches to improve its effectiveness;
- To ensure early success and prevent major failures that can slow down the momentum of change, an organisation should limit the scope for early change efforts; and
- An organisation needs a skilled leader, or change agent, to generate new ideas and to support individuals in the process of improving organisational effectiveness.

From the preceding discussion it may be deduced that Sono views the skills of the manager as being critical for implementing changes in an organisation. In addition, Sono (2002) cautions that it should not be assumed that renewal strategies are understood by all people in management positions since some managers may not even comprehend the types of changes that are to be implemented in their organisations. Sono's assertion implies that there should be an understanding of the basis and forces for changes in an organisation. On the other hand, Toffler (1980) notes that to survive and avert 'future shock' people need to be continuously adaptable to evolving conditions and also be capable to anchor themselves in the new reality. The added pressure on organisations to accommodate new, unfamiliar challenges and opportunities may be gauged by the degree to which leaders are able to undertake large amounts of transformational change, rather than incremental piece-meal change (Werner 2002). It is both explicit and implicit from Werner's view that change should be global and not sectoral in organisations.

Marchello (1987) cautions that professional isolation – in an age of global change and reform – may render organisations irrelevant to the intellectual realities of the present age. It may be construed from the preceding statement that managers

should embrace change and lead employees and stakeholders to move from being concerned with limited and narrow gains, and transform them into agents of global and holistic changes in organisations (Heystek 2002). The preceding statement alludes to the essence of change and paradigm shifts in organisations. Covey (1989) notes that paradigms are maps, and as new buildings are erected the maps change to include these new buildings.

Evidently, Covey suggests that while maps and paradigms indicate the way things are at a particular time, they also portray the way things should be in future. It is interesting to notice that paradigms are not static, but they are dynamic and are open to change as needs arise in the broader orb. Furthermore, the researcher also observes that while paradigms are dynamic, they are stable and do not fluctuate. In the same vein, Table 3.7 presents key factors enhancing change in organisations.

Table 3.7 Key factors for enhancing change in organisations

Key factor	Intensity
Normalisation of change	<ul style="list-style-type: none"> <li>▪ Change and experimentation are the norm rather than a necessity during crisis.</li> <li>▪ Ongoing learning processes are important.</li> </ul>
External focus	<ul style="list-style-type: none"> <li>▪ The organisations must build functioning linkages with the external world to stay current and in touch with external reality.</li> <li>▪ Environmental fit.</li> </ul>
Management of tension	<ul style="list-style-type: none"> <li>▪ Building interactive organisations.</li> <li>▪ Establish incentives to foster cross-unit interaction and commitment to organisational goals.</li> </ul>
Focus on implementation	<ul style="list-style-type: none"> <li>▪ Develop a culture of change with sustained and committed organisational leadership.</li> </ul>
Forging new co-operative endeavours	<ul style="list-style-type: none"> <li>▪ Redefine traditional organisational boundaries.</li> <li>▪ Form strategic alliances with stakeholders and other parties interested in the business of the organisation</li> </ul>
Engagement of skilled and experienced leaders	<ul style="list-style-type: none"> <li>▪ Active leadership roles of individuals are important for bringing real and sustainable changes in organisations.</li> </ul>

Adapted from: Van der Westhuizen (2002: 131).

From the preceding Table 3.7 it is apparent that change management and leadership requires development of a culture that is based on commitment to sustained renewal in organisations. It is acknowledged that change occurs when new realities replace old ones, and this requires new approaches to doing things in organisations (Robinson 1992). However, Heystek (2002) is of the opinion that one needs to acknowledge that change is always characterised by uncertainties, fear [of failure, loss and the unknown] as well as disruptions in existing relationships. For this reason, Van der Westhuizen (2002) notes that inspiring a shared vision involves explaining intended changes and getting the 'buy-in' from staff and other stakeholders in order to ensure a focus to common purposes. It is acknowledged that stakeholder participation is essential for effective change management.

### 3.9.2 Participation in the change process

According to Dawson (1993:255), the emergence of competition and sophistication of consumer needs would always influence the direction and form of changes that are instituted in an organisation. Stated alternatively, change within organisations is always necessitated by outside factors. For example, Kivinen & Kaipainen (2002) note that programme, disciplinary and institutional diversifications are logical results of the development of the sciences. Without doubt, old disciplines evolve to form new fields of science and disciplines [with new research methods], and consequently structural changes may be necessary to reciprocate the changes experienced in an organisation (Moloi 1998). In the same vein it is observed that an educational institution is not an island, and thus it cannot be operated in isolation from what happens around it (Mason 1998). In the light of the preceding statement Toffler (1980) ascribes diversification of school programmes to the diversification of consumer needs in the USA.

In a free-market economy consumer demands and specifications would always precede in business and trade, and consequently production would always be linked to consumer needs (Dawson 1993). This then makes it necessary that stakeholders not only influence changes in the school situation, but they should also be actively involved in implementing changes in schools (Republic of South Africa 1996). It suffices to state effective change management demands that managers be conversant with key concepts in school development (Moloi 1998:30). In addition, Sono (2004:404) notes that participation in the change process would be recognized when there is a shared vision among stakeholders for changes that are to be instituted in an organisation. Noting the essence of change management Capra (1982) states:

... what we need, then, is a fundamental change in our thoughts, perceptions and values. The beginnings of this change are already visible in all fields, and the shift from a mechanistic to a holistic conception of reality is likely to dominate the entire decade. The gravity and global context of our crisis indicate that the current changes are likely to result in a transformation of unprecedented dimensions, a turning point for the planet as a whole...

From Capra's point of view one may construe that the ability of the manager to change is necessary for effective integration and preparation of employees for changes in the organisation. To effect changes in an organisation requires great skill, and Dawson (1993:266) advises that managers should enlist the assistance of external agents to facilitate implementation of changes. As one may observe from Dawson's assertion, managers should not to operate in silos or cells, but rather that they should ask for help from change management specialists. Against the background of the preceding statement, Robinson (1992:304) contends that effective change may be orchestrated by inside and outside experts since outsiders may hold an objective view of the school. In addition, team effort by 'inside' and 'outside' experts increases the probability of coming to an understanding of the strengths and weaknesses associated with an organisation's options when drastic changes are to be instituted (Heystek 2002).

Extending the discourse on implementation of changes in organisations, Robinson (1992:304) notes that wheels were invented not to be re-invented. The implication hereof is that managers may use existing strategies and structures to deal with changes confronting their organisations. On the other hand, Dawson (1993) notes that change cannot be transplanted from one organisation to another since organisations differ in naissance statements, visions, purposes, environments, and experiences etcetera. It suffices to state that while change is intended to improve the quality of products, systems and resources in an organisation, it should be relevant to the needs of the organisation. For example, interpretation of the term 'quality' in one organisation may differ from the other organisation's interpretation of the same concept. As a result, Tribus (1993) defines quality in the following way:

... quality is what makes it possible for your customer to be in love with your product or service. It is possible to produce a temporary infatuation by telling little lies about the product or service, by lowering the price or by adding clever little features, but these should not last. It takes quality experiences to sustain devotion. But love is fickle, so it is necessary to remain close to the person whose loyalty you wish to retain and to be ever on the alert for changes in desires...

It can be deduced that the quest for quality in organisations should not lead to the production of imitations. One needs to bear in mind that effective change comes about when it is stimulated by changes in the organisation's environment, and Robinson (1992) thus notes that change is not transferable from one organisation to another or from one culture to another. The implication of Robinson's assertion is that situations differ, and what may necessitate change in one organisation may not be mandatory in another organisation. As a result, employees may resist change that they perceive as being gratuitous and extraneous in their place of work. In addition, resistance to change may be due to lack of communication, information 'sifting', lack of support from management, power struggles and an increase in workload which are not in tandem with employees' expectations (Steyn 2002:271). Table 3.8 provides a comprehensive view of change management within a school.

Table 3.8 A summary of ISIP knowledge about change

Assumption	Explanation
The school is the centre of change	External reforms need to be sensitive to the situation in individual schools, rather than assuming that all schools are the same.
There should be systematic and systemic approaches to change	School improvement should be a carefully planned and well managed process over a period of several years
Educational goals should be attained effectively	Educational goals should indicate what the school is supposed to be doing for learners and society in general
There should be a multi-level perspective in the operation of the schools	Although the school is the centre of change is does not act alone. The roles of employees, managers, parents, SGBs, support services should be defined and harnessed
There should be an integrated execution of strategies	There should be linkages between the top-down' and bottom-up' approaches in an organisation. The top-down provides policy, aims and an overall operation strategy while the bottom up provides diagnosis, priority goal-setting and implementation

Adapted from Hargreaves and Hopkins (1991:118).

From Table 3.8 it may be deduced that change management and leadership are critical for relevance in addressing organisational development and staff retention in all institutions. Robinson (1992:299-306) thus notes that a conference for managers, consultants and academics concluded that:

- Effective change provides a new model of the schools of the future: major changes are effective when there is a clearly articulated vision of what the school would be like, where it aims to go and in what ways it would be different from its precursor;
- Major change is painful and it requires different ways of behaving, thinking and perceiving: effective change management requires stakeholders to make significant paradigm shifts in their attitudes and behaviours;

- Change is effective when it is recognised that it would spread through schools at different rates: 'big bang' changes are neat on paper but rarely work out so nicely in practice; and
- Effective change is line management and leadership driven: change management and leadership cannot be delegated.

According to Steyn (2002:271), change management requires one to know the degree to which staff is aware of the reasons for change, and whether they understand the degree to which change may be reconciled with aims, objectives and practices in the school. Van Huyssteen (1999:81) also notes that it is significant to identify factors influencing resistance to change before attempting to address such resistance. For this reason, Van Huyssteen (1999:82) concludes that when sources and reasons and the nature of resistance are known, then decisions on strategies to manage resistance can be made. Coetsee (1993:1820-1824) suggests the following model on phases in management of resistance to change (see Table 3.9).

Table 3.9: Phases in the management of resistance to change

Phase 1	Determine the preparedness and receptiveness for change	Preparedness and receptiveness are determined by existence a culture for change and how change has been managed in the past
Phase 2	Identify the sources of resistance	Sources can be classified as individual, formal groups or resistance coalitions
Phase 3	Determine the nature of resistance	Three categories can be identified namely: passive, active and aggressive resistance
Phase 4	Select, develop, and implement specific resistance management strategies	Strategies include: negotiation, co-option, provision of information, training, convincing and rewarding
Phase 6	Evaluate the effectiveness of the attempt to manage resistance to change	If the attempt is effective consolidate and manage it, if it is ineffective return to phase 1

Adapted from Steyn (2002:270).

From Table 3.9 it may be deduced that implementation of substantial change in an organisation requires well-formulated strategies for change management.

### 3.10 SUMMARY

Present-day organisations are concerned with the quest for effectiveness and efficiency to the point that they align their operations to quality orientated models of management and leadership. In organisations, including schools, talent creation is encouraged with an aim of ensuring the continuous supply of appropriately skilled personnel. In addition, to ensure that processes and the resources of schools are utilised effectively, managers should set up structures that are aimed at attainment of schools' strategic objectives. These structures should also ensure that employees are focussed on tasks and consequently, one may conclude that they [structures] should maintain business discipline in an organisation.

Major findings in this chapter include the following points:

- Stakeholder participation is necessary for mobilisation of resources that would assist in attainment of an organisation's vision;
- Pay and incentives enhance employees' morale;
- Functional structures are necessary for ensuring productivity in an organisation;
- An organisation should have an organisational strategy that is linked to the school's vision; and
- Change leadership is necessary for dealing with the negative tendencies such as low morale, apathy and dereliction of duty.

The Beehive Model provides an integrated approach to organisational management since it links and forges relations between fundamentals for organisational productivity such as: organisational strategy, stakeholder participation, talent creation, structures, pay and incentives, business discipline

and change leadership. It is evident that while the Beehive Model originated in the business world, it is relevant and essential for the renewal and transformation of schools. The following chapter focuses on management and leadership development models in developed and developing countries.

## CHAPTER 4

### MANAGEMENT AND LEADERSHIP DEVELOPMENT MODELS IN DEVELOPED AND DEVELOPING COUNTRIES

#### 4.1 Introduction

In the post-1994 period education in the RSA is seen as a conduit for the reconstruction and development programme [RDP]. For example, Mbeki (1995:34) states that in the reconstruction and development of South Africa investment in education is both a key to redressing the legacy of apartheid and the way for enhancing the productive capacity of the economy. The preceding discussion does not only challenge those engaged in education management to effect changes in the way they have been engaging in their everyday business, but it also necessitates that they provide leadership and capacity in the 'new way' of doing things in institutions they lead (Rainer 1999). Appropriately, Steyn (2002) observes that in the environment of change and transformation in the RSA, school managers do not only become agents of change, they also need to become subjects of change.

The reform initiative in education management and leadership in South Africa also rests on the premise that participation of educators, learners and parents in educational matters may enhance the achievement of desired transformation in schools (Mosoge & Van der Westhuizen 1998:73). It would appear that stakeholder participation in the evolving education landscape in the RSA would include the possibility of engendering increased enthusiasm, interest, commitment and effectiveness in schools. However, Brandshaw and Buckner (1994:79) note that the transformation of the school, and changes implemented to ensure the effectiveness of schools require that people change their views and perceptions about management and leadership practice. According to Mosoge and Van der

Westhuizen (1998:83), school management in the new dispensation should include the devolution of authority and responsibility from regional offices to the schools at the local level with the result that they have institutional autonomy.

The chapter focuses on management and leadership development in developed and developing countries, and the discussion that follows will elucidate these developmental imperatives:

- Locating the school management and leadership in the global context;
- Management and leadership development models in developed countries;
- Management and leadership development models in developing countries; and
- Factors necessitating changes in management and leadership development in South Africa.

#### 4.2 Locating school management and leadership in the global context

Dekker and Van Schalkwyk (1995) argue that governments have a humanitarian obligation to educate and provide the citizenry at large with skills, and knowledge. As a result, governments set up education systems to provide education to citizens, and these education systems are accountable to the governments. It should be expected that just as governments invest capital in schools, they [governments] should expect schools to be productive and effective in their work of educating, training and developing the citizenry at large. In the light of the preceding discussion it is observed that throughout the world there is increased emphasis on establishing and monitoring compliance of schooling with centrally established standards for curricula and educational outputs (Marchello 1987). In addition, ILO (1996a) contends that in order to create and monitor performance in schools, there is a need to make adjustments in the schooling system's functioning according to national requirements.

On the other hand, the debate on 'who should do what' in schools should be addressed in order to bridge the gap and create synergy between centralisation and decentralisation of power (EURIDICE 1999). Generally speaking, however, devolution and decentralisation in the 1990s profoundly marked shifts in administrative power, and there is every reason to believe that these trends should continue into the new century (ILO 1996a). It is noted that in decentralised schooling systems administrative tasks are reduced in favour of policy, standard-setting, research and information support activities. Mwosa (1987) also notes that just as national priorities and policies changed, more responsibilities accrued to managing disbursement of funds to lower levels of education or directly to schools, to different levels of education or institutions within them, and to specific target populations. It would appear that the trend towards decentralisation encourages transferring many decisions down the management line (ILO 1996a). It goes without reason that decentralisation – in schools – has minimised some aspects of authority, but increased advisory and coordination roles which maximise a global view of the education system (Mosoge and Van der Westhuizen (1998).

The following discussion focuses on the centralisation versus decentralisation debate.

#### 4.2.1 The centralisation versus decentralisation debate

The ILO (1996a) notes that virtually every country in Africa has formulated official policies endorsing some level of decentralisation. One by-product of decentralisation is likely to be an increased expectation that managers will play a greater role in instructional supervision, community relations and school management, activities for which many have never been trained (Mwosa 1987). According to Ndengwa (1987), managers in many parts of Africa have little or no formal preparation to understand the trade-offs (in terms of learning outcomes)

associated with the resource allocation decisions they may be asked to make. On the other hand, the ILO (1996a) notes that managers in Africa may not necessarily have the political skills needed to build the community participation and support that decentralisation is supposed to foster. It may be construed that a central challenge for education systems is on strengthening the capacity of managers to meet school targets and visions (Green 1987).

According to Kroon (1990:327), it is important that a school undertakes an evaluation of the effectiveness of its performance from time to time. However, ILO (1996a) observes that the recurrent debate is on the loci of evaluation, and it remains a disputed fact that only personnel appointed on management posts should be responsible for evaluation and assessment of educators and learners' performance. On the other hand, determination of criteria to be used for evaluation is equally disputed when making decisions on and for example performance appraisal and time in service (Kroon 1990). ILO (1996a) contends that in some countries administrative functions have been pruned so as to redirect personnel resources to teaching. However, changes have not, of course, been uniform across the world (Mwosa 1987). For example, the school manager – symbolising centralisation may delegate some responsibilities – indicating decentralisation – to subordinates (Van der Westhuizen 1999). EURYDICE (1999) also notes that alterations in the expectations and roles of educational personnel such as school inspectors [area project officers] have increased in the present-day.

Balanced between conflicting demands that they be both advisers and controllers of educators, inspectors recognise that their most important responsibilities transform in the direction of institutional and systemic concerns: whole school inspection, use of research outputs and training and development of teamwork with school managers (ILO 1996a). In general, school inspectors/APOs should provide a kind of monitoring and reporting glue for systems in the throes of rapid

and profound change (ADEA, 1995; ILO, 1996a). Nevertheless, Oosthuizen (1999:214) notes that the diversity of educational personnel in schools offer opportunities for collaborative ventures that bring together education specialists with different attributes, skills and expectations. In this instance, Mwosa (1987) concludes that the collective authority of education leaders and educators is greater than the authority of the leader and the group taken separately. It is observed that team-building and reinvigorating collegial decision-making between senior education officers and educators at the shop floor are all likely to be important future responsibilities of education managers at all levels (Fielden 1998; UNESCO 1998c). From the preceding discussion it may be construed that roles of education managers are in a state of continuous change.

#### 4.2.2 The changing roles of school managers and their deputies

According to Oosthuizen (1999), the diversification of roles and responsibilities, and attendant pressures on the "line managers" in schools and training sites, has been growing for years in educational systems. Arguably, the most profound changes have occurred in the out-of-school obligations of school managers: in the planning and organisational interface with various levels of educational authority, especially local or school boards; in independent fund-raising efforts among parents and community to make up gaps in decentralised funding arrangements; and in broader public relations activities (Holden 1999). As a result, Fielden (1998) notes that much time has been diverted from what is often viewed as the school managers' core task: providing the leadership for innovation and excellence in schools and learning institutions. In the same vein, countries have been obliged to rethink the responsibilities of school managers to lighten the burden and devote more time again to core tasks such as school management, leadership and administration (Blanchet, Wiener and Isambert, 1999).

According to IBE (1999), the role of the school leader involves nurturing several key factors for success within the learning site such as teamwork and collaboration among staff; responsiveness to students' concerns and aspirations, as well as those of their parents; and forward-looking planning and implementation of a host of administrative details – staff recruitment and/or initiation, equipment orders, and general organisation of the school. This comprehensive set of responsibilities linked to learning is naturally most extensive in those countries where school autonomy is the greatest – irrespective of whether they are responsive to local authorities or school boards (Fielden 1998). Blanchet et al. (1999) note that school managers in North America, Europe and the Pacific region are well advanced along this road, but the trends are widespread. In a number of countries, Sweden being a prime example, it is the school manager's responsibility to define and ensure the application of a school's strategic vision in relation to other components of the educational system (IBE 1999).

In other countries analogous responsibilities flow from school managers' position as a leader in a system that emphasises collegiate responsibility of all teaching staff for educational outcomes – as in Germany (IBE 1999). According to EURYDICE (1996b and 1997a), Poland now extends wide authority to school managers in school personnel policy, budget decisions, pedagogical supervision of educators, and organisation of teaching timetables (IBE 1999). In the United States, the key rôle of School managers in promoting collaborative planning, teaching and use of resources between educators and librarians has been highlighted (Haycock 1999). A premium has been placed on the school manager's front-line responsibility to meet these expectations of strategic leadership that translate into the capacity for "self-managing schools" (Caldwell & Spinks 1992).

According to EURYDICE (1997a), the premise here is that the greater autonomy of schools to organise their educational activities is accompanied by the extension of a school manager's responsibilities to assess educators and as far as possible

organise or provide the necessary conditions (finding replacements, reorganizing timetables) for in-service training and professional development of educators. In Denmark, the school manager establishes the in-service policy, allocates resources and makes decisions on course distribution among educators while in New Zealand school managers are required to assess their new educators and recommend to the Educator Registration Board if full registration is warranted (EURIDICE 1996b). However, IBE (1999) notes that educator shortages in Denmark imply that almost all new educators should be recommended. EURYDICE (1997a) notes that managers' roles are likely to grow parallel to decentralisation trends in very diverse systems, even highly centralised ones, as school managers' leadership roles expand to ensure a dynamic learning environment. According to EURIDICE (1996b), in small Caribbean countries such as Grenada and Saint Lucia, school managers are responsible for the daily organisation, conduct, activities and administration of schools. The Philippines' policy of "empowering" school managers – Box 4.1 – provides an example of extended roles of school managers

#### Box 4.1: The School Manager Empowerment Policy of the Philippines

The move towards decentralisation in the Philippines has relied on a policy of empowering school managers by giving them more administrative authority and corresponding accountability for improving teaching competences and learner achievement. School managers should develop curricula innovation within a nationally given framework, manage school operating funds to which they may add on funds raised through PTAs and community associations, design school improvement models in cooperation with parents and communities, and participate in the selection, recruitment and promotion of educators.

Source: IBE, 1999.

From Box 4.1 it appears that in the Philippines the decentralisation agenda relies on empowerment of school managers in order that they become accountable for

improving educators' competences. The following discussion focuses on educator empowerment in international and globalised education systems.

#### 4.2.3 Educator empowerment

According to the ILO (1996a), educational analysis in recent years has begun to come back to the idea that educators and the way they perform their work are at the core of any successful strategy for educational reform. Longstanding international standards on the importance of a high material and social status for educators as a critical variable for quality education are underpinned by more recent policy papers or statements which insist on the need to place educators "at the heart of the process" (OECD, 1998b). These papers also note that classroom reform in the final analysis rests on the "capacity and willingness of educators to implement it" (Connell, 1998), and have called for "upgrading of their status" if lifelong learning is to fulfil its central function in future societies (Delores, 1996). The International Conference on Education in 1996 adopted a Declaration for member states of UNESCO recognising "the importance that the contribution of educators brings to the renewal of education through their ideas, methods and practices" (ICE, 1996). More recently, the Köln Charter on Aims and Ambitions for Lifelong Learning, adopted by the G-8 in June 1999, declared:

... educators are the most vital resource in promoting modernisation and higher standards; their recruitment, training, deployment and appropriate incentives are critical to any successful education system...

It suffices to state that transforming what appears to be a policy consensus into specific reforms that create a truly professional teaching corps of high quality people, and capable of delivering a quality service is a much more significant challenge than adopting a declaration or report (UNICEF 1999). Indeed, many advanced educational systems have begun to put into practice reforms in

education, but in most cases the educational reform processes end up being intellectual rhetoric (Dekker & Van Schalkwyk 1995). According to EURYDICE (1996a), the operative concept for educator empowerment is professionalisation which implies that educators' work include a greater sense of "managerial" (professional) responsibility for curricula development and change, teaching approaches, work organisation and learning outcomes. Motivation to perform at the highest possible standards of professional conduct, defined together by educators and other stakeholders, should become an intrinsic by-product of this orientation (CEART 1989).

Walker (1992:260) notes that as part of educator empowerment work designs involve specification of the activities, methods and relationships of jobs in order to satisfy performance requirements. By creating job conditions that motivate educators internally, a school ensures that gains are made both in the productive effectiveness of the school and in the personal satisfaction and well being of educators (CEART, 1989). According to UNICEF (1999), some work design models combining one or more of these elements include the Bangladesh Rural Action Committee (BRAC) schools which have spread extensively since the 1980s, educator empowerment programmes in some states of India, integrated school development projects in Tunisia, the Complementary Opportunities for Primary Education (COPE) programme in Uganda, Democratic Education Workshops in Chile and Escuela Nueva schools in Colombia, just to name a few. The innovations of work designs have sometimes met with mixed success as indicated in Box 4.2.

#### Box 4.2: Innovation in rural areas of Colombia: Escuela Nuevo schools

A central concept of the Escuela Nuevo schools of Colombia involved freeing educators from the constant responsibility of classroom instruction through a mixture of group work, use of instructional guides, learners' self-evaluation and school governance and stronger relations with parents and community. Educators are encouraged through in-service training to assume new roles as facilitators and guides for self-directed learner learning individually or in groups rather than transmitters of knowledge, as developers of new or adapted teaching materials, as managers of resources such as libraries and learning centres, and as community leaders. Initial evaluations of the programme tended to show significant learning successes in Spanish and mathematics as compared to more traditional schools, though later evaluations reportedly concluded that educator practices and learners' learning outcomes had not significantly changed in comparison to traditional rural schools.

Source: McGinn, 1998.

From Box 4.2 it is noted that the willingness and capacity to respond to changes in the learning environment, be they in the form of technological innovation, shifts in the age, socio-economic, or ethnic composition of learners are essential in school management and leadership. In this respect, McGinn (1998) has concluded that after its initial pilot phase, expansion on a mass scale diluted the essential element of the approach. The researcher notes that the aim of the implied job designs is to build increased challenge and autonomy into the work for educators and school managers. It would appear that educator empowerment promotes the fulfilment of roles in the school.

#### 4.2.4 The essence of different roles, different skills, different aptitudes in education management

According to Tosi (1995: 414), schools frequently use committees, project teams, and other types of groups in all stages of decision-making processes. In this context, educator involvement or participative leadership philosophy is an attempt

to get better decision-making strategies and more commitment by including educators in decision-making structures – and not only school managers (EURYDICE 1996a). CEART (1989) notes that collaborative effort between educational authorities and educators, and the potentially positive role that educators' organisations can play in such efforts, constitute other relevant concepts for policy development in school management and leadership. Closely linked to this issue of role fulfilment (and responsibility to a larger framework) is that of the educators' role in research, reflection and innovation (Steyn 2002). Examining (researching) pedagogical practice in classes and schools, transforming the knowledge gained into innovative changes in content or methodology that improves learning outcomes, and networking this information to other practitioners are crucial if a real learning community is to emerge in schools and training sites (CEART 1989).

Some observers have noted the increasing potential for opportunities afforded by information technology to allow individual educators to network with other educators, and with available teaching resources electronically at minimal cost (OECD 1999). According to UNICEF (1999), achieving more widespread implication of educators in such practices, to the point that it becomes an accepted part of a educator's job responsibilities, should require training in research techniques which are adapted to the school or site environment, incentives to innovate and time. Along with proper work organisation, these factors are essential to establishing professional practice as a "privileged space of learning" for change (Torres 1999). The researcher observes that an autonomous and 'liberated' educator is empowered to create efficacious learning opportunities in the classroom.

#### 4.2.5 Emphasis on quality in education

Notwithstanding the importance of educators' roles in effective teaching, the hub of work remains teaching, and it is here that substantial new roles need to be implemented on a large scale (CEART 1989). ILO (1996a) notes that divergences from the classic "one educator in front of a class of learners" model that dominated the "industrial" school approaches rooted in the nineteenth century have been on the agenda for some time in many OECD countries. In the policy studies presented to international education gatherings, there is increasing evidence of the concern over stultifying teaching methods such as rote learning and blackboard copying which still prevail in a host of countries in Africa, Latin America, and Asia (IBE 1999). Additionally, IBE (1999) also notes that hand wringing of educational specialists aside, there has been remarkably little change in the predominant way to carry out their work in the vast majority of school settings, be they rich or poor countries. On the other hand, Fielden (1998) notes that as accountability to students, parents and taxpayers – who fund the bills – grows, education institutions have been increasingly pressured to modify the conception and the incentive structures of work to emphasise new roles. Among the clamouring for quality in education is the need for high-quality teaching – in addition to that of research – based on:

- skills and knowledge of student learning,
- assessment and use of information technology;
- the ability to handle a growing proportion of part-time and "mature" students;
- use of both distance learning and face-to-face instruction; and

- the provision of services to local communities, industry, commerce, public services, or even regionally based entities in collaboration with other service providers (CEART 1989).

Against the background of the views expressed by CEART in the preceding paragraph it is also observed that quality concerns are influenced not only by public accountability drives, but also by technological progress, institutional management and finance changes, and alterations in the external economic environment, especially labour market demands from employers and students (UNESCO 1997a and 1998c). According to Fielden (1998), one of the difficulties with the trend towards accountability in general – and with meeting centrally imposed standards in particular – is the increased amount of time that individual must spend on non-teaching activities (record-keeping, reports to external assessors). ILO (1996a) notes that previous ILO reports have reported on the changing nature of work in schools and its intensity, the burdens (even stress) on and the distractions from the core function of teaching/learning that they create.

Combined with the evident need to rethink the roles and responsibilities of school managers while remaining on focus as to their tasks (CEART 1989). Accordingly, Fielden (1998) notes that participation of parents in all aspects of schooling has been growing worldwide, and there is considerable attractiveness in the idea of an extra pair of hands or hands-on knowledge from the world of work in the classroom. The researcher observes that the situations depicted in the preceding discussion may not be looked as if they are isolated and irrelevant to other educational contexts, they are also challenges facing the South African education system. As a result, to keep up with educational challenges – as observed in other countries – the education policy framework in South Africa should allow for provision of quality education. The following discussion focuses on exemplars on

management and leadership development models in the United Kingdom [UK], United States of America [USA], Tanzania and the RSA.

#### 4.3 EDUCATION MANAGEMENT AND LEADERSHIP DEVELOPMENT MODELS IN UK, USA, TANZANIA AND RSA

According to Dekker and Van Schalkwyk (1995), education systems may be unique and particular, but they have universal commonalities. In the same vein, educational management in the present dispensation should be linked to the acquisition of values and attitudes that address cross-cultural conflict, xenophobia and ethno-centricity (Smit 2002:18). In the light of the preceding view, education is to be undertaken as a process of 'turning the eye of the soul from the darkness of ignorance' (Akinpelu 1990:30), and consequently schools should capacitate learners to live in harmony with other people in an open and plural society (Koekemoer & Olivier 2002).

Education should not only capacitate learners to be open-minded about the world, but also that they engage in creating the world they covet. Valchanges (1996:82) concedes that education should emphasise agreement on values that should be shared, changed or kept out of society' cultural background to circumvent prejudice and discrimination. School managers should set up structures that address issues of race, religion, cultural difference and cognitive differences in order to ensure equal educational opportunities and to build a human rights culture in the school situation (Hicks 1991:626). The researcher acknowledges that school management and leadership development models in the USA and UK would have an influence in the model adopted in South Africa.

#### 4.3.1 School management and leadership development models in the United Kingdom

Daresh (1987:5) cites Weindling and Earley (1987) when they stated that despite having been told about various aspects and having worked with heads<sup>5</sup>, the initial experience of being a head and sitting in the 'hot seat' still came as a shock. For example, newly appointed school managers faced problems such as conflict management, school-community relations, tensions with staff and interpersonal skills (Bush 2003). The following Box 4.3 presents a synopsis of school management careers in the UK.

##### Box 4.3: New teaching careers in the United Kingdom

The Government of the United Kingdom's plans for a revamped career structure for head prospective school managers, deputies and prospective school managers, first announced in 1998, and scheduled to be implemented in 2000, are built on an integrated approach to professional and career development as a key to its standards-based strategy for better schools and learning. Up to an estimated 5 per cent of prospective school managers would be recruited initially or while in service via a "fast track" promotional scheme based on selection processes to target high performers, tailored training opportunities, excellent performance assessments and a willingness to accept contracts implying a longer work year and greater mobility. These could lead to earlier promotions to head positions.

Planned support for prospective school managers' work and careers include new management arrangements, more professionals working in schools, school exchanges, information technology fellowships and free access to the National Grid for Learning.

Source: DfEE, 1999.

From Box 4.3 it may be construed that in the UK there is a planned and systematic approach to training and developing prospective school managers. In addition, in the UK annual appraisals based on a performance management framework are

<sup>5</sup> In the English education system a school manager is regarded as a headteacher/head.

designed to assess prospective school managers' performance against objectives agreed in advance with schools or department heads (Lumby 2003). Daresh (1987) also notes that after advancing through the first level, prospective school managers have the right to apply for a nationally based assessment in order to cross the threshold to the second level; the assessment would combine internal and external elements measured against new national standards and focused on strong classroom performance. To address the issues and challenges indicated in the preceding statement, Bush (2003:1) notes that the National College for School Leadership [NCSL] was opened in 2000 to provide a single national focus for leadership development in The United Kingdom. Notably, the NCSL was instituted with the sole aim of formulation of leadership development models for school managers.

Bush, Coleman, Wall and West-Burnham (1996) also note that parallel to the New Visions programme, the Leadership Programme for Serving Heads [LPSH] used consultant heads to act as mentors. It would appear that consultant heads are essential for the management and leadership development programme because they are practitioners facing the same issues as school managers (Bush 2003). In the light of the foregoing discussion, Meyer (1998:109) notes that the British education system implemented leadership development and radical reforms in education in order adapt to the changing world. The eminence of effective school management and leadership is evident from the strategies adopted to enhance the skills and knowledge levels of school managers in the British system of education (Hicks 1991). For example, the Think Tank comprising of academics, practitioners and representatives from industry and commerce listed the following principles for leadership development and to guide NCSL's activities:

- Leadership is purposeful, inclusive and value driven;
- Leadership is dispersed throughout the school community;

- Leadership builds capacity by developing the school as a learning community;
- Leadership is future orientated and strategically driven; and
- Leadership is developed through experiential and innovative methodologies (NCLS 2001).

From the preceding discussion of the NCLS it would appear that management and leadership development in the British schooling system underpins the New Vision programme of the NCSL. The New Vision programme was developed to meet the leadership development needs of school managers in the first three years of school principalship (Bush 2003). To ensure that school managers attend the New Vision Programme, funds are made available from Head educators Leadership Management Programme [Headlamp]. According to Bush (2003:3), the programme has an unusual mix of content and process with an emphasis on participants' personal and school contexts. NCSL (2002:31-32) summarises the key learning processes and protocols of the programme:

- Action enquiry;
- Action learning sets;
- Coaching and mentoring;
- Diagnostic instruments;
- Leadership learning portfolios;
- Peer coaching; and
- Inter-visitation.

Bush, Briggs & Middlewood (2002) contend that in their first Beehive Survey of the New Visions Programme they acknowledged that participants might not attain all the protocols. However, participants benefited from think pieces and short summary papers prepared by academics (Bush 2003:4). In addition, participants are stimulated to think about key issues in education management and leadership. In the light of the effectiveness of New Visions, Bush (2003:4) notes that

formative and summative evaluations are conducted with the following specific objectives:

- To establish the felt needs of participants, consultants and facilitators before, during and after the programme;
- To establish whether, and to what extent, the programme builds on the ten principles set out in the NCSL's Leadership Development Framework;
- To establish the quality of programmes as perceived by participants and other stakeholders;
- To examine the impact of the programme upon participants and their schools; and
- To assess sustainability of this Model of leadership development.

Against the background of the preceding discussion Bush (2003:10) concludes that the consultants brought a wealth of knowledge to the New Vision Programme. For example, consultants contributed to leadership development especially towards attainment of school vision, motivation, performance management, decision-making, negotiation and interpersonal skills. Seemingly, the approach to use consultant head strengthened collaboration between the experienced school managers and novice managers. It is observed that the approach of using Consultant Heads added value to the work of newly appointed school managers in the sense that they tapped management skills from experienced colleagues as indicated by the special examination of collaborative consultancy using experienced by Heystek in 2002. To illustrate the significance of consultant heads for the New Vision Programme, Bush (2003:10) provides the following data from 18 consultant heads.

Table 4.1: Potential contribution of consultant heads

Anticipated potential contribution [main areas]	Number of consultant heads identifying this area [whole numbers]
Vision of the school	16
Motivating others	15
Interpersonal relationships	15
Leadership skills	15
Performance management	14
Monitoring and evaluation	14

Looking at the numbers provided in the preceding Table 4.1 it may be deduced that consultant heads assist in management and leadership development in the British schooling system. In their report, Bush, Briggs, Middlewood, with Blackburn & Stephen (2003) indicated that the New Visions programme provided the participating school managers to look at themselves, their behaviour and where they find themselves objectively. There is thus evidence to conclude that New Vision Programme enhances management and leadership development. Consequently, Bush (2003:13) notes that participants in the programme indicated that after being in the programme for eighteen months they are:

- More reflective
- Reviewing their approach to leadership and management;
- Focussing more on the big picture;
- Improving their people management skills; and
- Improving their leadership qualities and skills.

The New Visions programme emphasises processes rather than content and its focus on experiential learning is based on personal and school-based issues. Bush (2003: 15) notes that the process-led approach of the programme may need to be preceded by a content-based course since without such preparation the programme might have been an empty vessel. It is apparent that lack of content-based knowledge may lead to a situation in which the leadership development

programme is foundering on an inadequate knowledge base. In addition, Dimmock & Walker (2002) note that an increasing awareness on the importance of culture and context in educational management and leadership enlightens people to acknowledge that it would be unwise to assume that the NCSL New Vision programme has direct implications for educational management and leadership models in South Africa.

The following discussion focuses on management and leadership models for school managers in the United States of America.

#### 4.3.2 Recruiting and training school managers in the United States

Due to a variety of factors, including school board sponsored 'buy outs' and other incentives for early retirements, significant decreases in the number of people who should be entering the field of professional education, and increases in student enrolments of some school districts, there should be a need for substantial number of new school managers in the USA (Daresh 1986). Daresh (1986) also notes that to counter the growing shortage of quality candidates prepared to move from teaching to principal positions, the city of Philadelphia launched the Leadership in Education Apprentice Design (LEAD) programme. According to Parkay and Currie (1992:80-81), a tripod of support for school managers in the USA consists of the following: -

- Training: workshops designed to help school managers identify technical expertise within the district in such areas as law, budgeting, scheduling, use of computers and planning. In addition, training includes workshops on effective techniques for working with faculty and staff, including listening skills, providing information, participatory decision-making, and school management;

- **Networking:** creation of and participation in a School Manager's Academy, creation of district-wide school managers' support groups, and creation of an electronic bulletin board for school managers; and
- **Coaching:** identification of retired school managers and other school managers who could serve as mentors, training for supervisory personnel in order to provide Encouragement and support to newly appointed school managers, and Encouragement for school managers to form peer relationships similar to the Peer-Assisted Leadership [PAL].

The US Department of Education (1987) states that effective superiors provide guidance and technical support from experienced peers that should help new managers adjust and succeed. It would appear that while the search for a school manager ends when one is appointed, the process of getting an effective school manager is a continuous process. As a result, Anderson (1992) as cited by Legotlo (1992), indicates that a school management and leadership development programme should:

- Develop course work and practicum for school budget planning and management;
- Orientate beginning school managers to districts;
- Institute a buddy system;
- Give beginning school managers feedback;
- Facilitate peer-group problem solving and idea sharing; and
- Facilitate regional in-service.

Just as Anderson acknowledges the significance of the buddy system, Pharis and Zakariya (1979), as cited by Legotlo (1992), note that each year nearly 11 000 individuals enter a school in the USA as new school managers. Nevertheless, these new school managers experience two distinct emotions: excitement and

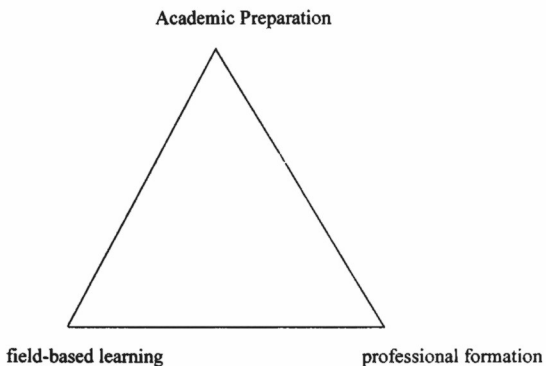
anxiety (Daresh 1986). According to Legotlo (1992), it seems obvious that to cope with their new jobs these new school managers need exposure to management and leadership models. As a result, in New York a more modest programme of half-day seminars organised by the School Administrator's Association, "Look Before You Leap", is aimed at preparing promising educator candidates for principal positions (Olson 1999). It is observed that the 'Look Before You Leap' school management and leadership programme is conducted over the school year and is designed around the following phases as indicated in Table 4.2.

Table 4.2: Phases in a school management programme

Phase 1	Pre-Programme Data Collection involving completion of three indexes on Leadership Capability, Leadership Behaviour and School Culture.
Phase 2	Residential Programme – 2 days and one evening focusing on core concepts of leadership, individual capability, individual development planning.
Phase 3	Progress Check individual contact for progress check.
Phase 4	Data Re-collection involving completion of three indexes on Leadership Capability, Leadership Behaviour and School Culture.
Phase 4	Review Session review of progress, individual capability review and planning for the future.

The preceding Table 4.2 indicates that training in school management and leadership programme is open to those aspiring to be appointed in school leadership positions. However, experienced and prospective school managers, as well as assistant school managers are eligible to apply for this statewide programme. Daresh and Playko (1989) propose a three dimensional framework for professional development of school managers and school administrators as indicated in Figure 4.1.

Figure 4.1: Three dimensional framework describing professional development of school managers and administrators



From the preceding Figure 4.1 it may be construed that academic preparation is linked to what one learns at a university or training institute. Daresh and Playko (1989) note that field-based learning is linked to internships, planned field experiences as well as practices, while professional formation is linked to mentoring, reflection, platform development, styles analyses and personal professional development. In addition, Daresh and Playko (1992:149) state that newly appointed school managers should understand the ways by which the effectiveness of the school may be enhanced and assessed. Invariably,

management and leadership are viewed as being essential for the quality of education provided by the American schooling system, and a variety of management and leadership development models were developed. The following discussion focuses on some of those models.

#### 4.3.2.1 Centre for Advancing School Principalship Excellence [APEX]

Silver (1987:68) notes that APEX was designed to redress some of the weaknesses of other approaches to the training of managers. The guiding principles of APEX were:

- School managers were asked to do something that is for them new and different. Anonymity and confidentiality were maintained at all times;
- APEX existed for practising school managers. Reporting was frequent, concise, practice-orientated and codified;
- Time and training were needed for the acquisition of skills in analysing situations and writing cogent case records;
- Patience and long-range perspectives were essential qualities for all persons associated with APEX; and
- The professional knowledge generated by the APEX Centre was regarded as tentative and subject to revision (Silver 1987:76-78).

From the preceding discussion of Silver it may be construed that school managers who participated in the APEX programme got recognition from their peers. Silver (1987:79) thus states that:

- A network of professors was established to share insights about case records. The results from the discussions were used for improving pre-service and in-service training for school managers;
- Modification of case record forms and promotion of reflective management. Modifications ensured that school managers improved their practice because they revealed key elements to be considered before taking action in schools; and
- Development of satellite research centres. As the collection of practice-based case records grew, there was a reciprocal need for more research centres to deal with data that could be unmanageable for the APEX Centre.

Just as the APEX assisted in management and leadership development in the USA, the American Association of School Administrators [AASA] also engaged in management and leadership development.

#### 4.3.2.2 AASA and management and leadership development in the USA

According to AASA (1985), the Platform and Resolution of 1985 reaffirmed concern for high quality school administration in the USA. As a result, AASA urged collaboration between school and University leaders in order to improve school governance and leadership. The basic premise behind the formation of the AASA was that prime purpose of school managers and administrators should ensure that schools service their basic purpose of producing learners who could fit into the American way of life. However, it also emerged that schools could not fulfil their mandates unless school managers and administrators have the capacity to take their school's strategies and making the effective systems for nurturing the

skills and values that promoted the notion of the American Dream. The guidelines for AASA included leadership outcomes and competencies, and Hoyle (1987:87-92) provides the following Table 4.6 as a synopsis of AASA operations.

**Table 4.6: The AASA Model**

<b>Leadership Outcomes Goals</b>	<ol style="list-style-type: none"> <li>1. to establish and maintain a positive and open learning environment</li> <li>2. to develop and deliver an effective curriculum which expands the definition of literacy, competency and cultural integration</li> </ol>
<b>Competency 1</b>	<ol style="list-style-type: none"> <li>1. human relations, organisational development, and leadership skills</li> <li>2. skills in participative management and variations in staffing</li> </ol>
<b>Competency 2</b>	<ol style="list-style-type: none"> <li>1. skills in developing school and community relations, coalition building, and related public service activities</li> <li>2. developing strategies to negotiating, lobbying, collective bargaining, policy development, and policy implementation</li> </ol>
<b>Competency 3</b>	<ol style="list-style-type: none"> <li>1. planning future methods to anticipate occupational trends reliable performance indicators for instructional outcomes</li> <li>2. using media to enhance instruction</li> </ol>
<b>Competency 4</b>	<ol style="list-style-type: none"> <li>1. using instructional and motivational psychology</li> <li>2. managing change to enhance mastery of educational goals</li> </ol>
<b>Competency 5</b>	<ol style="list-style-type: none"> <li>1. assessing system and staff needs in order to identify areas for staff development and allocation of resources</li> <li>2. appraising the effectiveness of staff development models</li> </ol>
<b>Competency 6</b>	<ol style="list-style-type: none"> <li>1. facilitating planning, management and operations</li> <li>2. knowledge of legal concepts, regulations, and codes for school operation</li> </ol>
<b>Competency 7</b>	<ol style="list-style-type: none"> <li>1. gathering, analysing and interpretation of data</li> <li>2. understanding descriptive and inferential statistics</li> </ol>

It would appear that Table 4.6 provides an elaborate description of elements for the AASA model for management and leadership development in American schools. The AASA model is a comprehensive model for capacity building in schools that promotes the view that the school manager is the key information link between the school and its environment. In addition, Hoyle (1987:90-92) provides Table 4.7 to depict the synopsis of the programme delivery components of the AASA model.

Table 4.7: Delivery components of the AASA Model

Management system component	Diagnostic ability Design capability Instructional ability Resource capability Programme evaluation capability
Content components	Administrative, organisational, political and learning theory Technical areas of administrative practice Behavioural and social sciences Research Ethical principles of the profession
Clinical components	Comparison of programme knowledge-base and personal experiences Diagnosis of sources of difficulty Systematic observations
Professionalisation renewal components	

From the preceding discussion it may be construed that AASA presented a comprehensive and intensive model for management and leadership development

for the American schooling system. Legotlo (2002) appropriately observes that AASA furthered the view that formal authority presupposes that the school manager is responsible for operating the school's organisational status system. Surely, as an instructional leader, the school manager should develop policies, curriculum. In addition, instructional leadership requires that school managers establish staff development teams in schools to ensure that educators engage in programmes that refine and hone their teaching capacity. The following discussion focuses on elucidation of the Maryland Professional Development Academy Model [MPDA].

#### 4.3.23 MPDA and management and leadership development in the USA

Sanders (1987:00) is of the opinion that the MPDA is a yearlong intensive training programme that enhances instructional leadership of school managers. From Sander's assertion it may be construed that the MPDA is aimed at improvement of instructional leadership in order to ensure that schools respond to the learning needs of their clients. The essence of instructional leadership in the creation of a nation's intellectual cannot be minimised, and consequently the MPDA is funded by the Maryland State Department of Education and it is aimed at serving the needs of 2258 school managers employed by the State Department (Sanders 1987:99). Some of the essentials for effective school management which appear in Table 4.8 are summarised as:

- Awareness;
- Skill development; and
- Follow up.

Table 4.8: Fundamentals of the MPDA Model

		Factor
Awareness	Planning	Meet local superintendents and staff developers to assess training needs of school managers and to obtain official support for skill implementation, Needs assessment, Expectations for training
Skill development	Intensive training grants	Knowledge and comprehension, Skill development, Technical assistance, Networking, Team building
Follow-up 3-months after intensive training		Skill development, Practice and feedback on the job, Networking, Needs assessment, Evaluation
		Implementation plan
Follow-up 8-months after intensive training		Skill development, practice and feedback on the job, networking, final review of action plan, evaluation
INSTITUTIONALISATION		

Table 4.8 presents a detailed model for management and leadership development in the sense that training and skill development are subjected to follow up programmes. Surely, effective developmental programmes are subjected to follow-ups in order to correct misunderstandings end to assess the success of such programmes. Van der Westhuizen (1999) notes that follow-ups are essential for corrective action and they [follow ups] involve re-evaluation of both the planned objectives and criteria for job performance. Nevertheless, it would appear that each of the American States has developed models for capacity building in management and leadership. In the following discussion the researcher focuses on models for school management and leadership in the Tanzania.

#### 4.3.3 School management and leadership development models in Tanzania

Tanzania is one of the poorest countries in the world with still many (36%) living under the poverty line and 19% living under the food poverty line (The Royal Netherlands Embassy in Dar es Salaam – Tanzania 2003:3). As a result, the overall performance of the education system is low, and attainment of the following aims of the education system in Tanzania is difficult:

- Creating a socialist society where human dignity, sharing of resources and exploitation of none will prevail;
- Creating greater African unity and a sense of commitment to the total community;
- Creating a spirit of self-reliance as a basis of development; and
- Creating industrial development by providing skilled personnel (Vos & Brits 1989:188-189).

It is worth-mentioning that Tanzanian Development Vision 2025 is based on the quest for self-reliance and the ideal for Education for All (<http://www.tan.go.tz>). Basic education is central to the Tanzanian strategy for development since it is seen as being crucial for initiating human resource development. To this end, Tanzanian Development Vision 2025 states:

... Tanzania envisages being a nation whose people are ingrained with a developmental mindset and competitive spirit. These attributes are based on the notion that education and knowledge are critical in enabling the nation to effectively utilise knowledge in mobilising resources for ensuring provision of a people's basic needs... Tanzania would brace itself to attach creativity, innovativeness and a high level of quality education cognisant of the reality that competitive leadership in the 21<sup>st</sup> century will hinge on the level and quality of education... (<http://www.tan.go.tz>).

From the preceding discussion it would appear that the main challenge facing Tanzania is to change its education system to be in tandem with present-day challenges.

#### 4.3.3.1 Primary Education Development Programme [PEDP]

The PEDP is a five years programme instituted in July 2002 and it is envisaged that it would end in July 2007. The Royal Netherlands Embassy in Dar es Salaam (2003) notes that financial support for PEDP comes from The Netherlands, Norway, Sweden, Ireland, France, JICA and World Bank, and the main goals of the Programme are:

- Enrolment expansion: the aim is to use existing educators and classrooms effectively by achieving a standard learner ratio of 1:45, providing incentives for redeployment of educators;
- Quality improvement: improving teaching styles and teaching methods to make them academically sound, child-friendly and gender-sensitivity;
- Capacity building: strengthening capacity and competence of the central LGA's; and
- Material and financial resource utilisation: institutional reform in line with national decentralisation policies, enhancing community participation and enhancing donor contributions.

#### 4.3.3.2 Quality improvement in the Tanzanian PEDP

As part of the programme for school improvement PEDP suggests the following steps for quality enhancement:

- Introduction of cost-effective in-service training;
- Revision of content of in-service programmes;
- More educator resource centres at school level;
- Creation of conducive learning environments; and
- Whole school development planning in every school (Education Sector Development Programme, PEDP 2003).

In the same vein, the Annual Plan PEDP, 2003 – 2004 acknowledges that capacity building should be undertaken in the Tanzanian education system in order to:

- Introduce management skills, participatory planning, implementation of monitoring and evaluation criteria in schools;
- Training of school committees in their new roles;
- Information and sensitisation of all stakeholders about PEDP;
- Continuation of school mapping expertise in all schools; and
- Training in financial management and encouragement of accountability and transparency.

From the preceding discussion it would appear that the PEDP would ensure quality in the Tanzanian education system. The following discussion focuses on school management and leadership development models in South Africa.

#### 4.3.4 School management and leadership development models in South Africa

Since 1994 South Africa has witnessed a number of models that sought to support school managers in school management and leadership (Steyn 2002). However, the ETDP SETA (2002) notes that there are problems and challenges associated with providing skills development to school managers since some struggle to identify their own training needs. Other problems that are related to challenges to management and leadership development are:

- Absence of clear performance criteria for school managers;
- Uncertainty about promotion requirements for school management posts;
- Absence of empirical evidence on the exact skills deficits of school managers; and
- Reluctance of school managers to go through soul-searching processes (ETDP SETA 2002:38; Bush 2003:16).

Against the background of the preceding discussion it may be construed that in the RSA challenges for management and leadership development are varied and complex. According to Jansen (1995), as a country that is currently in the midst of major changes, South Africa needs a new type of leadership – both at middle and senior levels – within schools and educational institutions. The development and delivery of quality education has been paralysed, mainly because of weak management, especially in historically disadvantaged schools (Steyn 2002). In addition, Jansen (1995) notes that a high percentage of school managers are poorly qualified and they had received inadequate preparation and training prior to their tenure of office. It is observed that education experts have come to realise that school managers play a pivotal role in the operation of schools as functional institutions (Van der Westhuizen 2002).

There had been some attempts towards development of management and leadership programmes for school managers (ETDP SETA 2002). For example, the main purpose of the Delta Foundation was to develop a cutting edge school managers' training programme that could serve as a Model of excellence in education management and leadership, and could be replicated throughout public schools in South Africa (Delta Foundation 2001). To this end, the Delta Foundation (2001) indicates that it received permission from both the National Department of Education and the Provincial Office to initiate an intervention programme for 30 school managers in the greater Port Elizabeth area. An advisory body consisting of former school managers, union representatives and members of the education department, was established to give direction to the programme, and the key features of the programme are the following:

- Stratified training for school managers based on the outcome of the application of a competency assessment instrument;
- Ensuring that the training programmes conform to the ETDP – SETA – SAQA standards;

- Ensuring that all training has a long-term strategic objective;
- Ensuring that all school managers' training should be a mixture of face-to-face contact and group work;
- The assessment process must be a site-based proven practice;
- School management must form the basis of all conducted training;
- That the school manager-training programme should focus on the delivery of the national curriculum statement and the effective delivery of quality education;
- The programme must be properly articulated, not short term and should have a residential focus;
- Rigorous impact evaluation and cost benefit analysis; and
- The department of education to support the initiative as a full partner by providing financial assistance to the programme (Delta Foundation 2001).

From the discussion of the objectives of the Delta Foundation it is evident that management and leadership development in schools should be linked to the need for development of innovative thinkers who would contribute to provision of quality education. As part of the strategy for school management and leadership development other service providers had their own objectives for programmes on management and leadership development, and the ETDP SETA (2002:35) notes that some of the management development programmes are provided by universities and technikons, short courses conducted by nongovernmental organisations [NGOs] and workshop-based training offered by the Department of Education. It is noted that the establishment of the Matthew Goniwe School for Leadership and Governance in Gauteng Province provided the potential to address

the issue of education management and leadership development in the RSA (Bush 2003:15).

According to ETDP SETA (2002:36) programmes for management and leadership development in South Africa had mixed successes. On a more developmental role, the notes that the Limpopo Province Department of Education indicated that in 2002 the EMD programme focused on schools that performed poorly in Senior Certificate examinations (ETDP SETA 2002). While the results of the effectiveness of the EMD programmes are not available, of significance is that the EMD programme dealt with the following topics:

- A framework for managing and leading schools;
- School management and leadership;
- Employment, induction and orientation of school-based educators;
- School management;
- Managing diversity; and
- Basics of record keeping and basic administrative procedures (ETDP SETA 2002:36).

It is noted that the ETDP SETA (2002:36) notes that the implementation of the EMD programme is fragmented since certain components such as monitoring and checking of progress are done by the Educator Development Directorate while some of the monitoring was done by the Labour Relations Directorate. However, Mahanjana (1999:9-10) notes the following salient points regarding strategic outcomes of EMD:

- Strengthening the capacity of district and regional officials to enable them to provide ongoing on-site professional support to school managers;
- Developing school managers as leaders and managers of collaborative management teams;

- Supporting the strategic role of school managers and school governing bodies in addressing challenges at school level;
- Advocating the EMD visions, principles and practices to education stakeholders; and
- Developing a holistic resource and distribution plan that acknowledges EMD as a function of people and organisational development.

From the fore-going discussion it seems obvious that Mahanjana suggests an integrated approach to EMD initiatives. In a study of twelve school reform programmes conducted by the Joint Education Trust [JET] on training offered by nongovernmental organisations [NGOs] it was found that all twelve programmes offered by NGOs provided some form of training to school managers (ETDP SETA 2002). Since most of these NGOs are not grounded in education and training, often their programmes are based on management theories that originated in the private sector. Significantly, the content of the training programmes included:

- Personnel management: developing a personal vision and mission, leadership skills, stress management, change management;
- Organisational development: vision crafting for the school, drawing up a mission and development plan, inspiring and staff motivation, conducting a SWOT analyses and strategic planning;
- Skills development: delegation, problem-solving, conflict management and resolution, aligning constituencies, team building, human resource management, employee appointment and induction, financial management and staff appraisal;
- Administrative management: computer literacy, timetabling, activity planning, improved record keeping, effective resource management and the planning of duty rosters; and

- Management of curriculum delivery: managing the classroom and quality assurance procedures (ETDP SETA 2002).

The ETDP SETA (2002) notes that Joint Education Trust [JET] found that weighting given to the different management skills in the training programmes was influenced by the management theories on which individual programmes are based. For example, some programmes put more emphasis on Covey's personal mastery, others are based on Senge's learning organisation while others emphasised a more technicist managerialism (ETDP SETA 2002). However, few post-programme evaluation studies are conducted, and thus the effectiveness and sustainability NGOs' management and leadership development programmes may be difficult to substantiate (Steyn 2002). It is noted that the key to effective school management and leadership development is to build capacity within the schooling system, and for this reason Bush (2003) contends that a process-based programme such as New Visions is more appropriate after content-based learning has taken place. Added to challenges on management and leadership development are key educational concerns linked to the restoration and sustenance of the COLTS such as:

- low morale and alienation among educators which lead to a culture of apathy and discontentment which debilitates against effective teaching;
- tension between educators and school managers and as a result apprehension and virulent belligerence which make cooperation incomprehensible;
- disciplinary problems and time spent in trying to address these problems, misconduct and dereliction of duty;
- below average performance of both learners and educators;
- absenteeism, lack of motivation to work and lack of loyalty to the profession and a disregard of the employment contract;

- threats of industrial action by educators and the abuse of the 'right to strike'; and
- ineffective management and leadership of schools (Moloi 1998:4; Steyn 2002:253).

One may assume that the state of affairs in South African schools [as depicted by Moloi and Steyn] provides evidence of the dysfunctional state of schooling in general. However, optimists may argue that the statements Moloi and Steyn's observations are challenges that may be appropriately addressed and put to rest as long as the education system generates appropriately skilled and trained school managers. Bush, Coleman & Thurlow (2003) are also optimistic about the future of schooling in the RSA, and they recommended the following:

- effective school management as a priority, including viable systems and structures, improved motivation for both educators and learners;
- a process-based programme such as New Vision;
- building confidence in school managers would assist in ensuring that they engage in soul-searching processes as done in the New Visions; and
- further development and training is required to produce a cadre of leaders with relevant skills and experience.

The following discussion focuses on challenges for school management and leadership in the 'new dispensation' in South Africa.

#### 4.4 CHALLENGES FOR SCHOOL MANAGEMENT AND LEADERSHIP IN THE 'NEW' DISPENSATION IN SOUTH AFRICA

Schneider (1997:105) notes that the 'new' educational institution in the RSA should esteem individual differences of learners and accommodate all learners regardless of physical, intellectual, social, emotional, cultural and other differences. In a multi-national and multicultural society there is an added need to

accommodate human diversity in all its forms. Invariably, school managers are equally challenged to change their attitudes about people's differences in order to ensure that they encouraged tolerance and uniqueness of people (Steyn 2002). Notably, the 1996 Constitution of South Africa, as amended, protects the rights of all people living in the country. One may conclude that one of the greatest challenges facing school managers is that of managing cultural diversity in schools.

#### 4.4.1 Management of diversity in educational contexts

Against the background of a racially and culturally divided education system of the pre-1994, the management of cultural diversity in South African schools in the post-1994 era is not only a humanitarian obligation, but it is a Constitutional imperative (South Africa 2000). However, Akinpelu (1990:93) concludes that no culture is superior to any other culture since what one culture lacks may be supplied by another culture. It may be concluded that just as all cultures are distinct and equal in value, schools are challenged to acknowledge cultural diversity in all educational programmes. Indisputably, management of cultural diversity demands that education provision be viewed as a dynamic process that evolves constantly since it forms part of the wider strategy to promote a democratic society (Burden 2000:30).

All learners are unique individuals, and schools should nurture their unique abilities, talents and potentials (Department of Education 1997). According to Burden (2000), the essence of diversification of learning process as well as accommodating individuality [and not individualism] in learning situations need not be confined since each learner has to progress through the education structure at his or her own pace. From the preceding discussion it seems obvious that schools should be steadfast in ensuring protection of minorities from

discrimination and redressing inequalities experienced by the so-called intellectually different and challenging learners. It suffices to state that the Department of Education (2000:5) states that the core mission of the school is to improve the educational achievements of all learners. Surely, in this context school management practices are required to ensure that schools adopt diversified curricula to enable learners with diverse cognitive abilities to succeed in their studies (Department of Education 1997).

The preceding discussion affirms that the Department of Education requires school managers to transform schools into centres of learning that adapt their programmes to the diverse needs of the learners. According to Mwosa (1987:119), in a diversified and multipurpose school management should be competent to specify multiple goals, weigh them, interrelate them and find synergic policies that accomplish more than a single goal at a time. It is assumed that diversification would not only assist schools to respond to the needs of learners they serve, it would optimise the response not for one, but for several variables simultaneously (Koekemoer & Olivier 2002). It is apparent that instead of the single 'bottom line' on which most school managers and managers have been taught to fixate, the new school manager requires skills to pay attention to integrate multiple bottom lines (Mwosa 1987:119).

The researcher observes that the quest for inclusivity and diversification in schools would necessitate reciprocal changes in school management and leadership practices.

#### 4.4.2 Change management and transforming schools into productive learning sites

In the evolving educational environment schools should not only endeavour to address what academic excellence entails, they should also instil a spirit of service in learners (Bodenstein 1996). Mahanjana (1999:2) notes that effective school

management is essential for a speedy, effective and efficient delivery of educational services. It is construed that just as change is always part of human existence, the most powerful instrument of change is quality education that prepares people for meaningful living in changing contexts (Steyn 2002). In the light of the preceding discussion, schools are required not only to assist learners to achieve the unity of their being, but also to acquire a unified understanding of the present-day world (Bodenstein 1996: 52). Education management in this evolving context should lead to the transformation of schools into effective institutions that do not only promote the re-generation of culture, but also into institutions that imbue learners with creative and competitive skills (Hicks 1991).

Acquisition of productive skills engenders self-sufficiency and consequently, Hickman and Silva (1988:180) contend that in the present dispensation people are to be enabled adapt to change in order for them to understand the world in which they live as well as to comprehend the interdependence of nations. Akinpelu (1990) notes that the school should ensure that learners are equipped with a realistic perspective on world issues, its problems and its prospects for continued existence. Social structures such as schools are not only characterised by changeability, but they are also guided by the need to initiate learners into social relations beyond national boundaries (Mathibe 1998). Presumably, when people understand the implications of change – as a phenomenon in human life – they would share in and contribute towards the transformation vision in South Africa (HSRC 2001a:5). The researcher is of the opinion that school managers are accordingly expected to ensure that schools integrate learners into society, and also that they also capacitate them [learners] to command their lives responsibly and meaningfully in changing contexts.

The following discussion focuses on management and leadership development in the context of democratisation and transformation in schools.

#### 4.4.2.1 Democratisation and school management and leadership in schools

According to HSRC (2001a:8), the legacy of a divided society in the RSA and its structural inequality necessitate insistence on the right to education and training for the citizenry at large. The application of the principles of democracy, fairness and justice in this sense thrives on systematic and collective acknowledging of human rights in planning, shaping and articulation of education programmes (RSA 1996). The Department of Education (1997) notes that the democratisation process in education is perceived as a necessary step in the transformation of South African society, and this is in accordance with the Constitutional imperative of building a united society that acknowledges the diversity of its cultural heritage. According to Holden (1999), the integrity and viability of a democratic and pluralistic society orbits around the efficiency of an education system to act as an agent of social consciousness and transformation. The researcher notes that the effective implementation of democratic principles within the schooling system demands that school managers foster management approaches that enhance stakeholders' participation in democratic decision-making processes.

The 1996 Constitution requires that education be transformed and democratised in accordance with the principles of human dignity, the achievement of equality, the advancement of a human rights culture as well as non-racialism and non-sexism (Department of Education 1997b:5). In the light of the preceding discussion, Mahanjana (1999:2) observes that school managers should harmonise their personal interests, skills and aspirations with the needs of society in transition. Mahanjana raises a challenge that school managers should be trained to work effectively in democratic and participative ways.



transformation of education in the RSA, there is a reciprocal need to determine the extent of support they require to negotiate and cope with the transformation processes (Mahanjana 1999:5). For example, in a period of rapid transformation there is always a possibility for the materialization of an erroneous consciousness that school managers are merely *ex officio* members with insignificant participation power in school governance (Mosoge & Van der Westhuizen 1998:82).

The following discussion would focus on education management in South Africa within the context of centralisation – the Single Ministry of Education – and decentralisation – within the 9 Provinces.

#### 4.4.3 Education management in a decentralised schooling system

According to the Department of Education (1996:36), the new policy framework for decentralised decision-making is embedded in the South African Schools Act of 1996. For this reason, decentralised management and leadership provides room for participation of and cooperation by stakeholders in attainment of the schools' strategic objectives. Mathibe (1998:142) notes that partnerships and collaboration in educational endeavours promote solidarity and stability in the schooling system. On the other hand Steyn (2002) also concurs that decentralisation of authority empowers stakeholders to contribute meaningfully to the development of the school. It is noted that in a democracy, such as practised in the RSA, education school managers and leaders should communicate education visions and expectations to stakeholders. It is noted that decentralised management and leadership challenges school managers to build functional teams to achieve the missions, goals and objectives of the schools (Fuhr 1990:45).

It suffices to state that effective management and leadership of schools require commitment to collaborative partnerships between stakeholders. According to the

Department of Education (1997:8), in a collaborative school system stakeholders are bound together by common goals and values. Hartshorne (1988: 32) notes that collaboration augments capacity in an institution and ensures that an institution carries out its functions effectively. From the preceding discussion it may be deduced that collaboration is a *sine qua non* for ownership of responsibilities in schools and it also makes stakeholders accountable for successes and failures in schools (Steyn 2002). It is the researcher's view that if collaborations are to be effective school managers should ensure that all stakeholders are involved on all the design of school programmes adopted, decisions made, and projects undertaken.

From the preceding discussion it is evident that significant changes within the schooling system may be attained through shared decision-making and participation in school activities. For this reason, Mosoge and Van der Westhuizen (1998:74) contend that in school management the decision-making process should devolve from the school management team to the stakeholder groups. Holden (1999) observes that implementation of participative management requires the delegation of authority from higher to lower levels, and school managers need to be trained to ensure the devolution of authority through decentralisation of power and creating room for participation by stakeholders. The South African Schools Act of 1996 notes that implementation of stakeholder participation in school governance is a necessity for the democratisation process in schools (Republic of South Africa 1996).

Collaborative school governance is typified by consultation and setting up of supportive structures to deal with education-related problems in the schools (Mol 1990:161). Whereas school governance used to be characterised by authoritarian and exclusive practices, the new policy imperatives require broad and democratic participation by parents, educators and learners through the medium of school governing bodies [SGBs] (Mabasa & Themane 2002:111). This implies that

present-day school governance in the RSA is aligned to the repertoire of influences from, and collaborative effort of stakeholders in education (Hartshorne 1988). Within this context of organisational leadership, the ETDP SETA (2002:56) notes that there is a need for understanding the role of the SGB in order to differentiate between professional management and school governance. According to the Department of Education (1997:14) the following are the functions of the SGBs:

- promoting the best interest of schools;
- developing the mission statement of schools;
- controlling and maintaining schools;
- deciding of the choice of subjects according to provincial curriculum policy; and
- ensuring that schools fees are collected according to decisions made by stakeholders.

From the preceding discussion it is evident that the Department of Education envisages a situation where there is a separation of management and governance functions in schools. According to Hargreaves and Hopkins (1991:137). collaborative school governance:

- creates commitment to a common purpose among governors, school manager, staff and the school's partners;
- improves communication and reduces misunderstandings;
- enhances motivation;
- prevents individuals from being isolated;
- generates a sense of collective achievement; and
- supports teamwork.

Against the background of Hargreaves and Hopkins' assertion one may construe that collaborative school governance establishes ways of working together in the school situation. However, Mosoge and Van der Westhuizen (1998:82) note that a

misguided idea may emerge that a school manager should only be an *ex officio* member with marginal participation in school governance. According to the HSRC (2001a:35), for a partnership to be meaningful and sustained, genuine attempts are required to recognise and validate the cultural and education diversity of the South African society and particularly in schools. In the same vein, Vratusa (1987:64) is of the opinion that the major requirement in the development of an effective education strategy is mobilization of all stakeholders and available resources [material and human] to ensure that school plans are implemented appropriately.

In this respect, Sergiovanni (1996) notes that an integral part of maximising people's participation and strengths depends on the ability of the school manager to mobilise people in the community to address challenges and to make progress in addressing them. The Department of Education (1997b:8) lists the following characteristics of effective partnerships:

- Mutual trust and respect;
- Shared decision-making;
- Shared goals and values;
- Common vision; and
- Open communication.

From the Department of Education's assertion there is evidence that partnerships create rapport between schools and communities they serve. According to Rummler & Brache (1991:13-18), education management and leadership provide the energy and instruments for attainment of education outcomes. Phiri (1987:93-94) states that characteristics of effective partnerships are:

- To inspire respect and confidence;
- To make quick and effective decisions under conditions of uncertainty;
- To communicate decisions and their implementation; and

- To undertake strategic planning both for short-term and long-term purposes.

The researcher is of the opinion that partnerships do not only ensure efficient and effective school management and leadership, but they also enhance the quality of education provided in their education systems. Ostensibly, partners share the same vision and own processes as a collective, and consequently responsibility for the school's success is shared equally. The challenge facing the South African education system is that of capacitating and empowering school managers to improve the quality of partnerships forged by schools. On the other hand it necessary that stakeholders understand their positions and roles in the partnership in order that they do not infringe into each other's domains.

#### 4.5 THE QUEST FOR SCHOOL EFFECTIVENESS IN RSA

According to Steyn (2002:257), the present emphasis in schools is on a commitment to constant and continuous improvement that involves everybody in the school. To this end, Mathibe (1998) notes that the quest for effectiveness in and of schools, and the thrust towards sustainable development in the RSA necessitate that school managers put in place essential mechanisms for enhancing and linking school programmes to the needs for national development. According to Steyn (2002:257), in the present dispensation schools have to fulfil new roles since in the information society it is necessary that computer literacy be provided as a basic necessity for effective teaching. The necessity for the transformation of education in South Africa is driven by two imperatives to which South Africa (2000) states that:

... First we must overcome the devastating legacy of apartheid and provide a system of education that ensures that South Africans have the knowledge, values, skills, creativity, and critical capacities required to build democracy, development, equity, cultural pride, and social justice. Secondly, we must establish a system of lifelong learning that should enable South Africans to respond to challenges of the 21<sup>st</sup> century...

School managers need to motivate actual living people to work hard for better effectiveness and quality in production of service.

#### 4.5.1 Education management in a globalised world: a new paradigm of a learning system

With the onset of globalisation, an increasingly diverse world of knowledge, technology, information was deployed in an increasingly means- and capitalised production services (Muller, 1997:198). Ukong and Ukwue (2004) discuss the appropriateness of any education system in monitoring its performance in terms of the degree to which it cultivates self-motivated and self-employment of learners. Plainly, school managers need to be able to create an environment that generates motivated and effective educators and inspired learners to continuously search for new ways of doing their respective jobs, in order to be self-fulfilling (Vahidi, 1997). On the other hand, Póhri (1997) states that the introduction of modern technology is impossible without a corresponding development of a highly educated and skilled operators.

Observably, Hall (1990:5) notes that major structural changes in volatile financial markets and continuous refinancing of credit services heighten apprehension and ambivalence among educators. Instructive teaching methods are rendered obsolete and out-of-date by new discoveries. Hall (1997:16) contends that the scarcity of skilled personnel was the chief reason why they could not receive the buttress expected from their former educational institutions. In a sense, the departments of education may not provide the adequate personnel. For school managers need to produce the expertise that will be sought by the labouring personnel in their schools (Gordon 1990).

In the light of the preceding statement, Wharose (1997:103) notes that the 1990 World Declaration of 1994 and the Caracas Programme of Action of 1994, respectively,

for self-reliance in African countries by a three-dimensional approach that entailed:

- Mobilisation of all available natural and human resources;
- Development of economic cooperation among non-aligned and other developing countries in fields of common interest; and
- Contributing as equal partners to economic cooperation on a global scale.

It appears Vratusa suggests that the Caracas Programme and the Arusha Declaration are relevant for the situation in South Africa should be as competitive as it wishes to be. In the same vein, there is an expectation that schools should be sites that guarantee skills development. Accordingly, Dawson (1993:155) states that schools need to give considerable attention to the task of ensuring that their employees have the skills necessary to do the present job properly and to be able to fulfil other tasks in the school. It is assumed that in a multi-dimensional schooling system, multi-skilling would assist in provision of quality education in an integrated approach.

#### 4.5.2 Management, integrated development and provision of quality education

Kraak (1994:32) notes that principles of holistic and integrated development necessitate the adoption of OBE by the South African education system. Furthermore, an integrated approach to education and training presupposes dissolving barriers between mental and manual labour (Mathibe 1998:142). Integration per se, requires regular and real involvement of people in the cultural, social, political and economic life of the community to understand and to improve the quality of their lives. For this reason, South Africa (2000) states that:

... Launched in March 1997, the new curriculum framework reconceptualises the nature of learning and teaching through the adoption of an outcomes-based system. In contrast to the traditional content-based methods of learning and teaching, Curriculum 2005 seeks to place the

emphasis on what learners should know and be able to do at the end of a course of learning and teaching ...

Harvey (1991:72) states that integration enables learners to undertake intellectual reconstruction of experiences through formal education. Against this background, school managers are challenged to convert schools into workstations and classrooms into workshops. Significantly, the Department of Education (1997) notes that OBE is a collaborative, flexible, trans-disciplinary, out-comes based, open-system and empowerment-oriented approach to learning. For this reason, Dawson (1993:161) notes that schools should look beyond the immediate future; they have to plan not only for what they intend to do in the future, but they have to plan for the required expertise to do those things they need to do in the future. However, it is noted that many school managers are not trained to direct their schools to be effective production sites in neither in the present nor in future (Venter 1989). The work-study continuum is inferred by Ginsberg (1998:202) when he states:

... In South Africa it is expected that there would be a closer link between the education system and the labour market. The German and Swiss apprenticeship system involves millions of young learners combining their education with on-the-job training over a period of three years...

Deriving from the preceding discussion, the researcher observes that school managers are in the vanguard of school effectiveness.

#### 4.6 SIGNIFICANCE OF EFFECTIVE SCHOOL MANAGEMENT IN SOUTH AFRICAN SCHOOLS

School managers are expected not only to provide an educational climate to enhance learning, but they are also required to set attainable priorities as well as realistic goals for schools they lead (Fuhr 1990:257). According to Black (1998:34), the general expectation is that school managers should set clear expectations, maintain discipline and implement high standards with the aim of improving teaching and learning for quality education to be provided by schools.

Chetty (1997:52) lists the following points about key factors for schools management and leadership:

- Purposeful leadership: The school manager understands the needs of the school and is actively involved in the school's work without enforce cumulative authority over educators;
- Structured sessions: There is an organised framework within which learners work, and yet they are allowed some degree of freedom within this framework;
- Intellectually challenging teaching: The quality of teaching promotes learners' progress and development. This needs challenging and stimulating tasks; and
- Maximum communication: Educators are encouraged to communicate with all learners whether in groups or as individuals.

From the preceding assertion by Chetty it may be construed that democratic school management is a prerequisite for effective schooling. Accordingly, Dawson (1993:161) observes that an important reason for emphasising the role of management and leadership is the contribution it might make in producing a more flexible and adaptable educator corps. The researcher observes that communication is viewed as a sine qua non for effective school management.

#### 4.6.1 The essence of communication in school management and leadership

According to Ndengwa et al. (1987:13), in most cases reform initiatives end on the level of rhetoric because experts use the language 'that is addressed at themselves' and their colleagues, and not the language that is accessible to archetypical people. It is apparent that Ndengwa and his colleagues are of the view that while the language used to communicate the necessity and strategies for reform needs to stand up to analysis by experts, it must be accessible to the people who would be working zealously in the reform process. To this effect, De Wet (1981) as cited in Van der Westhuizen (1999:383) states:

... The uniqueness of the school situation lies in the fact that it is necessary to have formal communication channels in the school as well as between the school and the parents and the school and the community at large...

Hargreaves and Hopkins (1991:137) concur with De Wet's statement when they state that communication involves illuminating what needs to be done, the time-scale involved and who is to do what. Instructional management also dictates that the school manager should give feedback to educators about their performance. The researcher is of the opinion that the so-called CLEAR Model may enhance educator effectiveness in content delivery since it encourages:

- Communication: expectations of the school are explained to educators and learners and performance standards are explained (Dawson 1993);
- Listening: educators and learners' views regarding expectations on performance standards for the school are considered (Hargreaves & Hopkins 1991);
- Encouraging: educators and learners are motivated and inspired to improve performance and aspire for quality (Chetty 1997);
- Agreement: collective agreement on performance indicators and operational strategies (Sono 2002); and
- Reporting: feedback is provided on successes and level of performance of educators and learners as a strategy for improving the quality of teaching and learning (Van der Westhuizen 2002).

From the preceding discussion it may be construed that the CLEAR Model is a collaborative approach that encapsulates essential instructional activities such as guiding, standard setting, feedback and communication. According to Ndengwa et al. (1987), if people are not involved in communication then it would be difficult to succeed in whatever activity they engaged in. surely, communication facilitates the setting up of performance indicators and performance standards. According to

Hargreaves and Hopkins (1991:140), performance indicators are distinctive, in that they:

- Refer to future rather than past performance;
- Relate to a planned target designed to improve performance;
- Are chosen by the persons who set targets;
- Influence the way targets are designed; and
- Emphasise success rather than failure.

Incontestably, schools are faced with diverse challenges relating to changes in the world, and it is imperative that school management be aligned to demands of the time.

#### 4.6.2 The quest for school renewal in South Africa

In a changing education landscape, school development requires adoption of a transformative approach that would change systems of beliefs, values and attitudes within a school in order that they are adapted to evolving social contexts (Sono 2002:539). Accordingly, Kotter (2003: 4) notes that an essential approach of developing institutions of learning is to change and produce new programmes based on the needs of the customers. To this end, Sono (2002: 539) states that:

... somehow there are organisations that manage change well continuously adapting their bureaucracies, strategies, systems, products and cultures, to survive the shocks and prosper from the influences that decimate competition... they are masters of renewal...

Accordingly, the Department of Education (2004) notes that the National Ministry of Education in the RSA has developed and decided on essential strategies for improving the quality of education in all public schools. In addition, Sono (2002:540) cautions that failing to change, when change is required, may lead to the demise of schools. The researcher is of the opinion that schools need structures that would assist them to manage changes they experience or anticipate.

by the following analogy of a chameleon: A chameleon epitomizes the modern organization:

- It changes colour to accommodate the changing environment such as light and temperature as well as internal factors such as fear;
- The shooting tongue catches a fly at a blink of an eye; and
- Slowly but surely it moves on its long legs;

The preceding analogy of the chameleon implies that the school needs structures that deal with change management; extrapolation and future studies [Research and Development units], production, marketing, quality assurance etcetera. The National Department of Education in the RSA has developed structures to deal with the following Projects of the Tirisano Initiative as indicated in Table 4.2.

Table 4.3 Projects of Tirisano initiative

Project	Strategic objective
• Project 1: making schools work	Concentrating on restoring confidence in the schooling system and improving the quality of education
• Project 2: leadership and management	Ensuring that all schools have management and leadership teams that are committed to the development of the culture that engenders quality; promote the vision and quality teaching and learning
• Project 3: Governance	Ensuring that all schools have governing bodies; to create the conditions for governing bodies to share experiences and expertise
• Project 4: status and quality of teaching	Developing a framework for educator development to promote and enhance the competence and professional skills of educators
• Project 5: learner achievement	Ensuring improved learner performance and attainment of school targets
• Project 6: School safety	Creating safe and tolerant by ensuring that all schools are free from crime, intolerance and sexual harassment
• Project 7: school infrastructure	Developing a plan for dealing with infrastructure backlogs in schools

Adapted from Department of Education (2000: 9-13).

From the preceding Table 4.3 it appears that there is a concerted effort to improve the general quality of schooling in South Africa and this requires school managers to be agents of change in the educational endeavour. According to Steyn (2002:256), when school managers provide leadership and not only issue out instructions in schools they generate a motivated and effective educator influence. Brandshaw and Buckner (1994:79) conclude that significant changes required in schools may only be attained through educator empowerment and shared decision-making in order to encourage them to change and to address educational problems effectively. For this reason, it is construed that motivation does not only inspire educators to work effectively, it also ensures that schools work efficaciously to:

- deliver quality service in a cost-effective way;
- communicate with clients and stakeholders in a transparent, honest and responsible manner;
- appreciate diversity, building trust and caring for one another,
- appreciate each other's talents, skills, needs and contributions; and
- empower staff members to perform their tasks (NWDoe 1995).

School manager should create a favourable environment for effective working relations in the school. According to Steyn (2002:256), leadership is about motivating people and consequently, managers should see their role as empowering others to make decisions about the operation of the school, rather than controlling them. It is also noted that changes in the schooling system are also necessitated by the fact that in the past emphasis was on the efficiency of schools and not on effectiveness. Steyn (2002:257) contends that while in the past many schools are run efficiently [since they are quit and neat], they produced poor results and not desired learning outcomes. It would appear that interacting with issues facing the school might motivate educators to purposefully engage in activities that are aimed at addressing those issues.

#### 4.7 SUMMARY

When education is high on the political agenda, and when politicians, both locally and nationally, are concerned with raising standards, there is an impatience with the rate at that standards are raised in schools. As a result, when changes in schools seem to be slower, more changes are contrived with greater prominence on monitoring their implementation. This is a true reflection of changes confronting school managers in South African schools since they should pioneer changes in schools from their pre-1994 traditions of laxity and ineffectiveness, to the post-1994 culture of effectiveness. The findings in this chapter include:

- Approaches to school management and leadership have changed throughout the world;
- Appointment to a post of school manager in the UK and USA requires prior qualification in school management and leadership;
- In South Africa a person may be appointed to school management positions even if that person does not have a school management and or leadership qualification;
- School managers are expected to implement democratic principles in schools;
- School managers should implement legislation promoting equity;
- School managers are also expected to motivate educators to work diligently in order to improve their teaching; and
- In the present dispensation emphasis in South African schools is on a commitment to constant and continuous improvement in schools with an aim of ensuring that effective teaching takes place.

In contrast, while school managers in the past believed that educators needed constant control and supervision, the approach in the new dispensation is to ensure that agreed-on outputs are achieved. Challenges – for school managers in South Africa schools – are countless, and consequently there is a need for management

and leadership development model that would capacitate school managers to deal with these challenges effectively.

## CHAPTER 5

### RESEARCH METHODOLOGY

#### 5.1 INTRODUCTION

According to Strauss & Myburg (1999:10), a research methodology is a diligent and systematic enquiry of a phenomenon in order to discover or revise facts and theories. On the other hand, Neuman (2000:10) notes that a scientific research method is not one single thing, it is a combination of ideas, rules techniques and approaches that the scientific community uses to arrive at valid and objective results. From the preceding assertion it may be construed that a methodology develops from a loose consensus within a scientific community, and it focuses on scientific attitudes or perspectives on the world (Mouton 2001). The researcher is of the view that while the scientific method is an ideal construct, the scientific attitude is the way people perceive the world.

In this study the researcher used a combination of qualitative and quantitative approaches to collect data. The concept 'qualitative method' refers to a variety of approaches to educational research that involve evaluation of various strategies such as ethnography, naturalistic inquiry, close study and participant observation (Kloep & Tarifa 1994:385). In the same vein, Burns & Grove (1993:28) contend that quantitative methods are scientific since they test reliability and validity of relationships that compose theory. It is observed that a quantitative enquirer uses an interactive style of inquiry drawing from diverse disciplines such as philosophy, history and biography literature and curriculum criticism (Mouton 2001).

Quantitative research method also uses case study design and analysis to focus on the one phenomenon. Cascio (1984: 42) notes that quantitative research methods are characterized by logic positivism, objectivity, descriptive approaches and deductions in order to generate numerical data. The chapter presents a discussion of the following:

- The research design;
- Sampling and sampling method;
- Aspects of measurement;
- Research instruments; and
- Administrative procedures.

## 5.2 RESEARCH DESIGN

Mouton (2001) defines a research design as a plan or blueprint of how one intends to conduct the research. This definition suggests that a research design focuses on the end product, and this requires the formulation of a research problem as a point of departure for focusing on the logic of research. In the light of the preceding statement, the research problem was stated and explained in Chapter 1 (cf 1.5). Huysamen (1993) regards a research design as a blueprint according to which data are collected to investigate the research hypothesis or question in the most economical manner. Huysamen's view is contradicted by Bless and Higson-Smith (1995) when they define the research design as a specification of the most salient points and operations to be performed in order to test specific hypothesis under given conditions. Against the background of the preceding discussion, the researcher views the research design as groups of small worked-out formulae from which goals and objectives of the study retracted.

It is acknowledged that there is a need to distinguish between quantitative and qualitative research designs as they are used in the study. Quantitative research design includes Beehive Surveys, experiments and content analysis (Fouche & De

Vos 2002: 138). In the research a randomised cross-sectional Beehive Survey was undertaken to investigate management and leadership development in the Bojanala East and Bojanala Regions, South Africa

### 5.2.1 Sampling and sampling methods

According to Seaberg (1988:240), a population is the total set from which individuals or units of the study are chosen. On the other hand, Bless and Higson-Smith (2000:85) are of the opinion that a population is a set of elements the research focuses on and to which obtained results are to be generalised. McBurney (2001:248) also refers to a population as the sampling frame. Strydom and Venter (2002:199) note that a sample contains elements of the population considered for actual inclusion in the study. In the same vein, Singleton, Straits, Straits and McAllister (1988:158) list the principles that influence the size of the sample as:

- The heterogeneity of the population;
- The desired degree of accuracy;
- The type of sample;
- Available resources; and
- The number of variables in which the data are grouped.

The principles propagated by Singleton et al. were applied in this study. From the three hundred and fifteen ( $n = 315$ ) primary schools in North West Province the researcher selected 200 primary schools to participate in the study (cf. 1.7.1). According to Strydom and Venter (2002:197) sampling is one of the most important factors in a research endeavour, and it is necessary to ensure representativeness of samples since at the end of the study the researcher would draw generalisations from the responses of the research population. As a result, the research population was drawn from all types of primary schools – as indicated by 80 schools from the rural areas and 120 schools from the urban areas in North West Province of the North west Province, South Africa.

The list of primary schools was compiled and 200 primary schools are randomly selected (cf 1.7.1). The random sampling of respondents (200 HODs, 200 school managers and 200 educators) was implemented with the aim of gathering information about management and leadership development in primary schools in Bojanala East and Bojanala Regions. Table 5.1 shows the distribution of sample of 600 respondents (200 school managers, 200 HODs and 200 educators).

Table 5.1 Distribution of the sample population

	Sample Population		Total
	Rural areas	Urban areas	
School managers	80	120	200 33.3%
HOD's	80	120	200 33.3%
Educators	80	120	200 33.3%
Total	240 40%	360 60%	600 100%

Before the empirical study could be undertaken, the researcher considered the following aspects of measurement.

### 5.2.2 Aspects of measurement

According to Delport (2002:166), a valid measuring instrument does what it is intended to do, it measures what it is supposed to measure and it yields scores whose differences reflect the true differences of variables being measured. It would appear that a valid instrument measures the concept in question accurately. The questionnaire [as shall be indicated in 5.3] has been selected for data collection since it ensures value-neutrality and it asks direct questions on the researched area. This necessitated that the researcher address the issue of content validity.

### 5.2.2.1 Content validity

According to Delpont (2002:167), content validity is concerned with the representativeness or sampling adequacy of the content. To discover content validity questions that are usually asked are: is the instrument really measuring the concept we assume it is? or are items indicated by a scale claiming to measure normlessness? For this reason, Bostwick and Kyte (1981) regard content validation as a judgemental process. The researcher had sought the assistance of Dr Nkadameng Manamela, who had been linked to the NRF for some years, to check on the content validity of the research instruments used in the study. The researcher also engaged in a prudent judgemental process when deciding on questions posed to respondents, and a pilot study was undertaken to check the content validity of the instruments (cf. 5.3.3.2).

### 5.2.2.2 Face validity

Delpont (2002) notes that face validity and content validity are often used interchangeably in research literature, although some methodologists conclude that they should not be thought of as synonymous. Face validity refers to whether the instrument is right or ok (Legotlo & Teu 1998:32). Consideration was taken of the importance of face validity in order to set the minds of respondents at rest. For this reason, the researcher clearly stated in the questionnaire that no one would be victimised since responses were treated confidentially (cf. appendix 1).

It was also important for the researcher to apply different research methods to attain a deeper insight on the views of respondents to the questions posed.

### 5.2.2.3 Triangulation

Triangulation assisted the researcher to seek out several and different types of sources to provide the same rationale for events or relationships. Neuman (2002:124-125) notes that triangulation is related to measurement of distances between objects by making observations from multiple positions. Surely, by observing phenomena such as management and leadership from different angles or viewpoints, researchers would get their true location. In the light of the preceding statement, the researcher used a questionnaire that had a mix of multiple-choice questions, interviews and checklists to collect data on school management and leadership programmes in primary schools.

Triangulation assisted the researcher to collect data on all aspects relating to the principles of the Beehive Model, thereby providing a basis for a management and leadership development programme for primary school managers. In addition, the use of multi-methods in the research assisted the researcher to synthesise and integrate different theories of research. Triangulation assisted the researcher to:

- be more confident about feedback from respondents;
- uncover off-quadrant dimensions of views regarding management and leadership development; and
- synthesise and integrate theories for management and leadership development.

Having presented the data on research design focus would now be on research instruments used.

### 5.3 RESEARCH INSTRUMENTS

According to Legotlo (1996) the questionnaire and individual interview are the most common instruments for data collection in Beehive Survey research. In the empirical investigation of this study, the questionnaire, interviews and checklists are employed as a tool for collecting data.

#### 5.3.1 Checklists

Checklists (see Appendix 1) are used to collect readily available data from school managers on the general environment of the school, operations in the school and resources available. According to Delport (2002:184), a checklist is a certain type of questionnaire consisting of a series of items. Respondents used checklists to indicate the items that are most appropriate to them and that applied to their situations.

#### 5.3.2 Interviews

Greef (2002:292) regards interviewing as the predominant mode of data or information collection in qualitative research. However, when conducting interviews researchers are challenged to establish rapport with participants in order to gain information from participants, coping with unanticipated problems, and recording and managing large volumes of data. A standardised open-ended interview was conducted with 50 [fifty] randomly selected school managers in order to elicit their individual responses to a set of ten open-ended questions. According to Greef (2002), standardised open-ended interviews are carefully worded and arranged for the purpose of minimising variations in the questions posed to the participants.

Data collected through checklists and interviews are supplemented by data collected through questionnaires.

### 5.3.3 Questionnaire

Questionnaires were administered to a sample of respondents selected from school managers, HoDs and educators. The questionnaire was used as the measuring instrument to collect data since it has the greatest influence on the reliability of the data collected. As a result, it had been important for the researcher to ensure that great care was taken when designing a questionnaire because an inappropriately laid out questionnaire could have led respondents to miss questions. Just as Ary et al. (1990:422) contend, the construction of the questionnaire proved to be a difficult and time-consuming task.

The following suggestions of Legotlo and Teu (1998:22) were considered when the questionnaire items were written:

- The questionnaire should be constructed in a way that reflects quality: after the questionnaire items were written the researcher requested a colleague to check on their relevance to the study and to recommend appropriate changes; and
- Questionnaire items should be phrased in such a way that they can be understood by every respondent: trial sessions were held with second year B.Ed students at North West University Mankwe Campus to check if the questions were easy to understand, and appropriate corrections were effected in the case of ambiguous questions:

From the preceding discussion on suggestions on the writing of questionnaires the researcher developed a questionnaire aimed at eliciting responses to questions pertaining to management and leadership programmes for school managers in primary schools.

The following discussion focuses on the format and content of the questionnaire.

### 5.3.3.1 Format and content of questionnaire

The questionnaire had two sections: Section A dealt with biographical data, and Section B contained closed multiple-type questions. Closed questions offer respondents the opportunity of selecting [according to instructions] one or more response choices from a number provided to them (Delpont 2002; Legotlo & Teu 1998:21-23). Seventy [70] items linked to the principles of the Beehive Model are used and for each item the respondents are asked to reflect on them using a five point Linkert scale [Strongly Agreed (SA), Agreed (A), Unsure (US), Disagreed (D) and Strongly Disagreed (SD)]. The first draft of the questionnaire was pre-tested in selected primary schools.

### 5.3.3.2 Pre-testing the questionnaire

A pilot study is a small-scale preliminary investigation designed to acquaint the researcher with flaws and problems that need attention before the major study is undertaken. It is essential that newly constructed questionnaires, that is, in their semi-final form, be thoroughly pilot-tested before being utilised in the main investigation. The major purpose of pilot-study was to detect errors and problems that would be identified and solved before the major study. Room was left for respondents to comment on the acceptability of questions in the questionnaires in order to assist the researcher to obtain a general impression on the feasibility of the questionnaire.

The questionnaire was pre-tested in selected primary schools in the Bojanala West Region using a sample (N=10), that is, five school managers and five HoDs. All the respondents returned their questionnaires and modifications are duly effected. However, the population of the pre-tested was not used in the final study.

### 5.3.3.3 Administering the final questionnaire

According to Delport (2002:174), sometimes field workers deliver questionnaires by hand so that respondents can complete them in their own time, and then collect them later. In this fashion, response rates are raised because of the personal contact and the fact that the field workers merely distribute the questionnaires and do not bother the respondents at an inconvenient time. The researcher also faced the same challenge particularly since Bojanala East and Bojanala West Regions of the Bojanala East and Bojanala Regions cover a vast area. Nevertheless, the researcher was enabled to distribute and collect completed questionnaires by using educators [who are registered in other educational programmes offered by North West University – Mankwe Campus] as carriers of the questionnaires.

The questionnaires are administered to 600 respondents (200 primary school managers, 200 educators and 200 HoDs).

### 5.3.4 Covering letter

A covering letter was used to introduce the questionnaire to the respondents (see Appendix 1). The purpose of the covering letter was to:

- Identify the person conducting the study;
- Tell why the study was important;
- Tell why it was important that the respondents answer the questions as genuinely as they could; and
- Assure the respondents that there are no right or wrong answers, that he/she would be not identified and that his/her answers would be treated confidentially (Cohen & Manion 1985).

From the preceding discussion it is evident that conducting research requires that certain administrative requirements be satisfied.

#### 5.4 ADMINISTRATIVE REQUIREMENTS

Permission to gain access to primary schools was granted by the Regional Managers in Bojanala East and Bojanala Regions. The list of primary schools and their location was obtained from Regional Offices. This information assisted the researcher in drawing up an inventory of schools and delivery of questionnaire to the schools.

#### 5.5 SUMMARY

A research methodology develops from a loose consensus within a scientific community and it focuses on scientific attitudes or perspectives on the world. The researcher used a combination of qualitative and quantitative methods to collect data. A quantitative method is a term for a variety of approaches to educational research and it involves evaluation of various strategies as ethnography, naturalistic inquiry, close study and participant observation. For an example, a standardised open-ended interview was conducted with 50 [fifty] randomly selected school managers in order to elicit their individual responses to a set of ten open-ended questions. Major findings in this chapter are:

- Quantitative research methods which are characterised by logic positivism, objectivity and descriptions are used to generate numerical data;
- Questionnaires are designed and distributed to respondents in order to source their views regarding the relevance of the Beehive Model to management and leadership development in primary schools; and
- Content validity implies that validation is a judgement process and therefore it is necessary that a research instrument be evaluated before it is applied.

Having dealt with research methodology, the next chapter would focus on data analysis.

## CHAPTER 6

### DATA ANALYSIS

#### 6.1 INTRODUCTION

According to Delport (2002) and McMillan & Schumacher (2001), one must differentiate between categories [dealing with qualitative data] and counts [dealing with quantitative or numerical data]. The researcher indicated to which group a subject belonged while simultaneously he recognised numerical values obtained through measurement and counting. It is also noted that statistical techniques used in the data analysis depended on the variables the researcher worked with. Delport (2002) notes that summation may be through the use of tables and graphical displays that may be used for more complex and sophisticated approaches in data analysis.

The researcher has thus used univariate data analysis techniques such as frequencies and tables in order to simplify the comprehension of responses received. A computer programme – Statistical Package for Social Scientists [11.0] {SPSS} was used for data analysis. In addition, the following data analysis tools were used:

- Graphs: they were used to depict biographical data on age, gender, position in the school and location;
- Tables: to depict frequencies, biographical data, and Chi-square results;
- Cross tabulation; and
- Chi-square tests to indicate data from hypothesised sets of populations.

The following discussion presents:

- A review of responses;

- Biographical background of respondents;
- Item analyses and interpretation of data;
- Mean score ratings; and
- T-test analyses and interpretation.

## 6.2 REVIEW OF RESPONSES

The researcher used a population comprised of 200 school managers, 200 heads of departments and 200 educators in North West Province of the North West Province. From the count of responses received the following points are recorded:

- Of the 600 questionnaires that were distributed, 556 [92.7%] were recovered. The breakdown of questionnaires that were received stands as:-
- Responses received from 164 [82%] school managers from the initial 200 school managers accounted for 29.5% of the entire population used for data analysis in the study;
- Responses received from 194 [97%] HoDs from the initial 200 HoDs accounted for 34.9% of the population used for data analysis; and
- 198 [99%] responses from educators from the initial 200 made up 35.6% of the population used for data analysis and interpretation.

It should be pointed out in advance that while a five point Linkert scale was used for data collection and analysis, for interpretation of data results the researcher combined Strongly Agree [SA] and Agree [A] as well as Disagree [D] and Strongly Disagree [SD].

### 6.3 BIOGRAPHICAL DATA

At this stage of the investigation, statistical techniques were used to analyse the data that had been collected. The observed data was finally expressed in percentages. Tables and frequencies. The section on biographical data made up Section A of the questionnaire (cf 5.3.2). Table 6.1 was drawn to illustrate the picture of characteristics of respondents.

Table 6.1: Description of biographical data of respondents

ITEM 4: GENDER OF RESPONDENTS		f	%
Valid	Male	206	37.1
	Female	350	62.9
Total		556	100
ITEM 2: POSITION IN THE SCHOOL		f	%
Valid	School manager	164	29.5
	HoD	194	34.9
	Educator	198	35.6
Total		556	100.0
ITEM 3: AGE OF RESPONDENTS		f	%
Valid	below – 30	52	9.4
	31 – 35	40	7.2
	36 – 40	202	36.3
	41 - 45	226	40.6
	46 +	36	6.5
Total		556	100.0
ITEM 4: LOCATION OF WORK PLACE		f	%
Valid	Rural	202	36.3
	Urban	354	63.7
Total		556	100.0

#### Item 1: Gender of respondents

Table 6.1 indicates that 350 (62.9%) female respondents participated in the study as compared to 206 (37.1%) male respondents. From the data collected it may be concluded that more females are employed in primary schools than males. One may deduce that in view of the principle of affirmative action females stand a better chance of being appointed to management posts in primary schools.

#### Item 2: Position of respondents in the school

Table 6.1 indicates that 164 (29.5%) of respondents are school managers, 194 (34.9%) are HoDs, and 198 (35.6%) are educators. From the data analysis it may be construed that educators' responses are more than the responses of the other categories of education personnel in this research. The response rate may indicate that members of school management teams [SMTs] are either too busy to respond to questionnaires or that they are not comfortable with dealing with issues that affect them in schools. It is acknowledged that this uneven response rate may affect item analysis (cf. 6.4).

#### Item 3: Age of respondents

Table 6.1 shows that 226 [40.6%] respondents from the total population are in the age category of 41 – 45, and respondents in the 46+ age category accounted for 29.1% of the entire research population. Since the majority of respondents are in the 40 and above age group, it is concluded that primary schools have adequately experienced educators whose age is above 40. The implication hereof is that most educators in primary schools stand a better chance of being promoted to management posts. In addition, the length of service of the majority of respondents indicates that most of the educators in primary schools have satisfactory understanding of how to work with parents and other stakeholders in the school.

#### Item 4: Location of the school

Table 6.1 indicates that 354 (63.7%) respondents teach in primary schools situated in urban areas, while 202 (36.3%) respondents teach in primary schools in rural areas – which include 58 (10.4%) educators working in farm schools and 144 (25.9%) respondents who teach in schools situated in villages. There are a variety

of reasons for the skewed distribution of educators according to locality and a few of those reasons are advanced:

- Most farm schools have multi-level and multi-grade classrooms due to low enrolments, and consequently most of these schools are one-educator school; and
- Since 1994 educators who were living in rural areas migrated to urban areas since urban areas were perceived to be having better resources for education, leisure activities and economic advancement than rural areas.

Having provided analyses of biographical data on respondents, focus will now be on item analysis in Section B of the questionnaire.

#### 6.4 STAKEHOLDER PARTICIPATION IN SCHOOLS

Schools cannot do without the contribution of stakeholders and thus, it is essential that teamwork and commonality be enhanced and nurtured in schools. School managers need skills to collect, analyse, organise and evaluate data from different stakeholders and not to pay attention to some stakeholders but discount the contributions of others. To this end, Van der Westhuizen (1999:294) states that:

... in carrying out his daily task the school manager is continually engaged in interactive relationships with people. The measure of success achieved in this complex interaction will determine his efficacy as an educational leader more than anything else. It is imperative that he is sensitive about creating and maintaining good relations...

Pertinent variables in this section include:

- communication;
- consultation; and
- policy formulation.

Table 6.2: Stakeholder participation in schools

Items	SA		A		U		D		SD	
	f	%	f	%	f	%	f	%	f	%
5.1 There are open lines of communication between the school and the home	36	6.5	478	86.0	40	7.2	2	0.4		
5.2 Parents and other stakeholders are consulted in all decisions taken in the school	244	43.5	242	43.5	66	11.9	4	0.7		
5.3 Educators are consulted when new policies are introduced in the school	284	51.1	198	35.6	74	13.3				
5.4 SGB members are actively involved in drawing up of school policies	112	20.1	426	76.6	18	3.2				
5.5 Communication channels are known by all stakeholders	348	62.9	164	29.5	38	6.8	6	1.1		
5.6 School accommodate the needs and diverse interests of stakeholders	30	5.4	484	87.1	40	7.2	2	0.4		
5.7 Parents are encouraged to participate in the education of their children	340	61.2	174	31.4	24	4.3	14	2.5	4	0.7
5.8 SGB members have been trained to govern the school effectively	288	51.8	162	29.1	10 2	18.3	4	0.7		
5.9 Stakeholder participation establishes an effective public relations strategy	242	43.5	230	41.4	76	13.7	8	1.4		
5.10 Mobilisation and participation of stakeholders ensure provision of quality education	36	6.5	478	86.0	40	7.2	2	0.4		

Item 1 There are open lines of communication between the school and the home

Table 6.2 indicates that the majority of respondents 514 (92.5%) affirmed that there were open lines of communication between the school and the home. A partnership between the school and parental home and regular two-way communication are necessary for exchanging information (Van der Westhuizen 1999:423). Ostensibly, communication between the school and learners' homes is essential for forging relations between these parties (cf. 3.3.1). It may be

concluded that school managers should uphold standards for opening lines of communication between schools and learners' homes.

**Item 2 Parents and other stakeholders are consulted in all decisions taken in the school**

Table 6.2 indicates that the majority of respondents, 486 (87.4%) agreed that parents and other stakeholders were consulted in all decisions taken in schools. The Department of Education (2000:7) notes that co-operating with one another as partners in education is necessary for achievement of shared goals. Similarly, collaborative decision-making should be encouraged and fostered in schools (cf. 3.3.2). It may be concluded that parents and other stakeholders should be consulted in all decisions taken in the school.

**Item 3 Educators are consulted when new policies are introduced in the school**

Table 6.2 indicates that the majority of respondents, 482 (86.7%) affirmed that educators were consulted when new policies were introduced in the schools. The school manager is in partnership with different interest groups including educator groups and formations, and therefore he/she should communicate with them (Van der Westhuizen 1999:211). Just as the contribution of educators is essential for provision of quality education (cf.3.6), consultation is necessary for legitimate policy development and effective policy implementation.

**Item 4: School governing body [SGB] members are actively involved in drawing up of school policies**

Table 6.2 indicates that the majority of respondents, 538 (96.7%) agreed that SGB members were actively involved in drawing up of school policies. According to the Republic of South Africa (1996), parents will have a much greater say in education in the new dispensation. Democratic systems uphold democratic processes which guarantee that structures such as the SGB be involved in drawing up of school policies (cf.3.3). It may be concluded that involvement of SGBs in

drawing up of school policies ensures ownership of the policies by all involved in the school.

**Item 5 All stakeholders know communication channels in the school**

Table 6.2 indicates that the majority of respondents, 512 (92.4%) agreed that all stakeholders know communication channels in the school. The channel of communication indicates the direction in which the message is moving, or is being communicated and connects the transmitter to the receiver (Van der Westhuizen (1999:207). Stakeholders should be familiar with, and know all channels of communication in the school (cf 4.3.4) in order that they present their contributions for school development in an appropriate and acceptable manner. It observed that when people understand the channels of communication they would know what to report to whom and by when.

**Item 6 Schools accommodate the needs and diverse interests of stakeholders**

Table 6.2 indicates that the majority of respondents, 514 (92.5%) agreed that schools accommodate the needs and diverse interests of stakeholders. The Department of Education (2000) notes that the role of the school is to uphold the Constitution, being accountable to the Minister, the Government, and the people of South Africa. Schools operate in order to advance the programme for social upliftment of the citizenry at large, and for this reason schools should accommodate diverse needs and interest of stakeholders (cf. 3.4). It is concluded that schools should accommodate the needs and diverse interests of stakeholders.

**Item 7 Parents are encouraged to participate actively in the education of their children**

Table 6.2 indicates that the majority of respondents, 514 (92.5%) agreed that parents were encouraged to participate actively in the education of their children. Parental participation in education is of strategic importance in promoting positive

attitudes and supporting the spirit of sincere cooperation (Van der Westhuizen 1999:389). Since parents are primary caregivers and educators of their children, their participation is a sine qua non for improvements in attendance rates and performance in schools (cf. 3.9.1). It is concluded that parents should be encouraged to participate actively in the education of their children.

#### Item 8 Members of SGBs have been trained to govern schools effectively

Table 6.2 indicates that the majority of respondents, 450 (77.9%) agreed that members of SGBs had been capacitated to govern schools effectively. The Department of Education (2000:20) notes that all governance structures would be properly constituted and capacitated in order to function effectively. To deal with their responsibilities effectively, SGBs should be capacitated and trained (cf. 3.4). SGBs should be trained in order that they create an environment that is conducive for effective teaching and learning in the school.

#### Item 9 Stakeholder participation establishes an effective public relations strategy

Table 6.2 indicates that the majority of respondents 472 (84.9%) agreed with the statement that stakeholder participation established an effective public relations strategy for the school. Stakeholders are team members and not enemies of the school, and every team member should have pride in the team (West-Burnman 1992). When stakeholders are treated with respect, and their contribution to school development is acknowledged, they would be more supportive of the school's programme of action. It may be concluded that stakeholder participation would improve commitment to, and involvement in school activities.

#### Item 10 Mobilisation of stakeholders ensure provision of quality education

Table 6.2 indicates that the majority of respondents, 514 (92.5%) agreed that mobilisation and participation of stakeholders ensured provision of quality education. Robbins (1996) also acknowledges that collaboration with stakeholders

ensures utilisation of a wide-range of skills and knowledge to promote the school's operational plans. In the light of the preceding discussion one may construe that stakeholder mobilisation is necessary for skill expansion aimed at the quest for quality education in schools (cf.2.4.4).

Table 6.3: Mean score ranking on stakeholder participation

Rank	Item number	Item	Mean	SD
8	5.1	There are open lines of communication between the school and the home	3.98	0.15
5	5.2	Parents and other stakeholders are consulted in all decisions taken in the school	4.30	0.49
3	5.3	Educators are consulted when new policies are introduced in the school	4.37	0.50
7	5.4	SGB members are actively involved in drawing up of school policies	4.16	0.21
1	5.5	Communication channels are known by all stakeholders	4.53	0.45
10	5.6	School accommodate the needs and diverse interests of stakeholders	3.97	0.14
2	5.7	Parents are encouraged to participate in the education of their children	4.49	0.57
4	5.8	SGB members have been trained to govern the school effectively	4.32	0.63
6	5.9	Stakeholder participation establishes an effective public relations strategy	4.26	0.56
8	5.10	Mobilisation and participation of stakeholders ensures provision of quality education	3.98	0.15

Table 6.3 indicates that item 5.5 has the highest response rate with average 4.53 and the standard deviation of 0.45. It may be concluded that: communication was enhanced in schools; and stakeholder participation was encouraged in school activities. However, from Table 6.3 it is noted that the lowest ranked item is 5.6 [schools do not accommodate diverse needs and interests of stakeholders] with an average of 3.97 and standard deviation of 0.14. According to McKay (1997:9), development has to touch on the aspirations and needs of people [as they are defined by the people]. The response rate indicates a gap between the school's vision and mission or operational plan and the needs of the community it is to serve.

## 6.5 STRUCTURES IN SCHOOLS

The school has to fulfil a variety of functions and therefore it needs to articulate functions with structures it has. Structures or organs in the school fulfil specific tasks and functions. The following variables were identified:

- Effective teaching,
- Autonomy,
- Structures,
- And multi-skilling.

Table 6.4: The essence of structures for school development

Items	SA		A	U		D	SD		F	%
	F	%	F	%	F	%	F	%		
6.1 Structures had been established to ensure that effective teaching and learning take place	340	61.2	174	31.4	24	4.3	14	2.5	4	0.7
6.2 There is congruency and synergy between structures and the vision and mission of the school	36	6.5	478	86.0			40	7.2	2	0.4
6.3 Structures promote transparency, effectiveness and accountability	242	43.5	230	41.4	76	13.7	8	1.4		
6.4 Structures in the school adopt their own unique operational plans	340	61.2	174	31.4	24	4.3	14	2.5	4	0.7
6.5 Structures write and provide reports about their operations	26	4.7	488	87.8	40	7.2	2	0.4		
6.6 Structures in the school dictate the level to which the school may effectively attain its goals	36	6.5	478	86.0	40	7.2	2	0.4		
6.7 When structures are fully functional they promote autonomy and entrepreneurship in the school	150	26.9	288	51.8	108	19.4	10	1.8		
6.8 Structures promote flexibility and sharing of resources for several functions in the school	242	43.5	230	41.4	76	13.7	8	1.4		
6.9 When structures are well-coordinated there is a potential for cross-functional and multi-disciplinary teams in the school	114	20.5	358	64.4	74	13.3	4	0.7	2	0.4
6.10 An institution-level educator support team mobilises expertise and skills from different fields of study	36	6.5	478	86.0	40	7.2	2	0.4		

**Item 1 Structures are established to ensure that effective teaching and learning take place in schools**

Table 6.4 indicates that the majority of respondents, 514 (92.5%) agreed that structures were established to ensure that effective teaching and learning takes place in schools. Mabale (2004) notes that structures enable school managers to identify areas for development of both physical and human resources. It may be concluded that structures should be established to ensure that effective teaching and learning takes place in schools (cf. 3.7.1).

**Item 2 There is congruency and synergy between structures and the vision and mission statements of schools**

Table 6.4 indicates that the majority of respondents, 514 (92.5%) agreed that there was synergy and congruency between structures and the vision of the schools. Structures should assist organisations to meet their operational targets (Vaida 2003). It may be concluded that it is essential to have congruency between structures and the vision and mission statements of schools (cf. 3.7).

**Item 3 Structures promote transparency, effectiveness and accountability**

Table 6.4 indicates that the majority of respondents, 472 (84.9%) agreed that structures promoted transparency, effectiveness and accountability. According to Van der Westhuizen (1999:118), the school is a human organisational structure that should provide stimulation and learning. It may be concluded that it is essential for structures to promote transparency, effectiveness and accountability (cf. 3.4).

**Item 4 Structures in schools had adopted their own unique constitutions and operational plans**

Table 6.4 indicates that the majority of respondents, 514 (92.5%) agreed that structures in schools had adopted their own operational plans. The school has

unique characteristics, and therefore school operational plans should not be duplicated and copied verbatim by other schools (Dawson 1993). It may be construed that structures in schools should have their unique operational plans.

#### Item 5 Structures provide quarterly operational reports

Table 6.4 indicates the majority of respondents, 514 (92.5.0%) agreed that structures provide quarterly operational reports. Van der Westhuizen (1999) is of the opinion that one of the management tasks is control, and control encapsulates evaluation and monitoring of work that is done in the school. It may be concluded that structures in schools should provide quarterly reports on their operational plans in order that the school manager is fully aware of the successes or problems in the structures.

#### Item 6 Structures indicate the level to which the schools attain their goals

Table 6.4 indicates that the majority of respondents, 514 (92.5%) affirmed that structures indicated the level to which schools attain their goals. The danger in an unbalanced organisational approach is that the emphasis may be laid on the organisation as a structure and thus underrate the contribution of the people (Van der Westhuizen 1999:118-119). It may be concluded that structures indicate the level to which schools attain their goals (cf.2.4).

#### Item 7 When structures are fully functional they promote autonomy and entrepreneurship in schools

Table 6.4 indicates that the majority of respondents, 438 (78.7%) agreed that when structures were fully functional they promote autonomy, and entrepreneurship in schools. It may be deduced that when structures were fully functional they promote autonomy and entrepreneurship in schools. Mabale (2004:40) observes that structures such as the SMT, SDT, IQMS committee,

sports committee and examinations committee should define outcomes for themselves and assess if they achieve these outcomes. The implication hereof is that school managers should encourage structures to be functional in order to promote autonomy and entrepreneurship in a school (cf.3.7.2).

**Item 8 Structures promote flexibility and sharing of resources for several functions in the school**

Table 6.4 indicates that the majority of respondents, 472 (84.9%) agreed that structures promote flexibility and sharing of resources for several functions in the school. There is a need to establish coherence and cooperation between structures in order to optimise utilisation and sharing of 'scarce' resources (Sono 2002). It may be concluded that structures should promote teamwork and sharing of resources in schools (cf. 2.4.4).

**Item 9 When structures are well co-ordinated there is a potential for cross-functional and multi-disciplinary teams in schools**

Table 6.4 indicates that 472 (84.9%) respondents agreed with the statement that when structures were co-ordinated there was a potential for cross-functional and multi-disciplinary teams in schools. The Republic of South Africa (1998) states that there is a need for co-ordination in the education system if high quality education is to be provided in schools. It is observed that co-ordination is essential for creation of cross-functional and multi-disciplinary teams in schools (cf. 2.2.3).

**Item 10 An institution-level educator support team [ILST] mobilises expertise and skills from different study fields**

Table 6.4 indicates that the majority of respondents, 514 (92.5%) agreed that an institution-level educator support team [ILST] was an example of a functional structure that mobilised expertise and skills from different study fields. The White Paper 6 of 2001 indicates that educator support services should be mobilised for creation of ILSTs (Department of Education 2001). It may be construed that an

ILST is essential for mobilising expert knowledge that may be used to enhance effective teaching and learning as well as effective school development (cf. 2.4.4).

The following discussion presents the mean score ranking on responses to the section dealing with structures in schools.

Table 6.5: Mean score ranking on structures in schools

Rank	Item number	Item	Mean	SD
1	6.1	Structures have been established to ensure that effective teaching and learning take place	4.49	0.56
5	6.2	There is congruency and synergy between the structures and the vision and mission of the school	4.12	0.42
3	6.3	Structures are based on and promote the principles of transparency, effectiveness and accountability	4.27	0.45
2	6.4	Structures in the school had adopted their own unique constitutions and operational plans	4.49	0.56
10	6.5	Structures write and provide reports about their operations	3.97	0.13
8	6.6	Structures in the school Do not only reflect the leadership and management and styles used, they also dictate the level to that the school may effectively attained its goals	3.99	0.15
6	6.7	When structures are fully functional they promote autonomy and entrepreneurship in the school	4.04	0.53
4	6.8	Structures promote flexibility and sharing of resources for several functions in the school	4.24	0.56
7	6.9	When structures are well-coordinated there is a potential for cross-functional and multi-disciplinary teams in the school	4.02	0.40
8	6.10	An ILST mobilises expert knowledge and skills from different fields of study	3.99	0.15

From Table 6.5 the items ranked highest are 6.1 and 6.4 with a mean of 4.49 and a standard deviation of 0.56. The lowest ranked item is 6.5 with the mean of 3.97 and the standard-deviation of 0.13. It would appear that: reporting about structures in schools was not done; and records were not kept about structures. The conclusion that may be drawn from Table 6.5 is that structures in schools did not record nor report their successes. According to Martin and Norman (1970:162), providing a management information system [MIS] should ensure that learners and educators are able to collect data and information on performance, compare results with pre-established objectives, and develop corrective measures for

optimal performance. The following discussion focuses on responses on pay and incentives in education institutions.

## 6.6 PAY AND INCENTIVES IN EDUCATION INSTITUTIONS

People are driven by different urges to work enthusiastically and to the optimum of their potential. However, there are other theorists – such as Herzberg – who conclude that pay and incentives are not good indicators of employee productivity. The following variables were identified in the research: motivation; cooperation; despondency; and productivity.

Table 6.6: Pay and incentives in schools

Items	SA		A		U		D		SD		Total	
	F	%	F	%	F	%	F	%	F	%	F	%
7.1 Management knows that needs satisfaction is linked to educators' level of motivation	340	61.2	174	31.4	24	4.3	14	2.5	4	0.7	556	100.0
7.2 Management ensures that teaching is intrinsically meaningful and challenging for educators	22	4.0	492	88.5	40	7.2	2	0.4			556	100.0
7.3 Educators are given recognition for good work	36	6.5	478	86.0	40	7.2	2	0.4			556	100.0
7.4 Educators who know that they stand a chance to be promoted are more co-operative than those who know that they have reached a cul-de-sac in their careers	174	31.3	340	61.2	24	4.3	14	2.5	4	0.7	556	100.0
7.5 Ambivalence about delegation of work creates conflict	112	20.1	426	76.6	18	3.2					556	100.0
7.6 Educators perform below standard because they know that the school does not offer any incentive for outstanding work	346	62.2	164	29.5	38	6.8	5	1.1	2	0.4	556	100.0
7.7 Management is responsible for low output there is favouritism	36	6.5	478	86.0	40	7.2	2	0.4			556	100.0
7.8 Educators who are better paid are more dedicated to their work than those who earn less	114	20.5	358	64.4	74	13.3	4	0.7	2	0.4	552	99.3
7.9 Restructuring affects educators' motivation and morale	36	6.5	478	86.0	40	7.2	2	0.4			556	100.0
7.10 Schools lose enthusiastic educators to competitors in the private sector.	112	20.1	426	76.6	18	3.2					556	100.0

**Item 1 Management acknowledges that needs satisfaction correlate with educators' level of motivation**

Table 6.6 indicates that the majority of respondents, 514 (94.6%) agreed that management acknowledged that needs satisfaction correlated with educators' level of motivation. Vaida (2003) notes that most companies that offer employees competitive salaries and incentives are able to maintain their levels of motivation. The data collected indicate that it is essential for management to acknowledge that needs satisfaction correlates with educators' level of motivation (cf. 3.8).

**Item 2 The management ensures that teaching is intrinsically meaningful and challenging to educators**

Table 6.6 indicates that the majority of respondents, 514 (92.5%) agreed that management ensured that teaching was intrinsically meaningful and challenging to educators. Charlton (2000) observes that extrinsic and intrinsic rewards energise and maintain productive behaviour in an organisation. It may be concluded that it is essential that management ensure that teaching is intrinsically meaningful and challenging to educators (cf, 3.8.2).

**Item 3 Educators are given due recognition for their outstanding work**

Table 6.6 indicates that the majority of respondents, 514 (92.5%) agreed that educators were given due recognition for their outstanding work. According to Mabale (2004), managers should acknowledge the work done by educators, and this can be done by just a spoken word during meetings and at school assembly. Surely, when educators' outstanding contribution to the success of the school in achieving its goals is acknowledged they may be motivated to work harder. It may be concluded that it is important that educators be given due regard for their outstanding work (cf. 3.8).

**Item 4** Educators who are aware that they stand a chance to be promoted are more co-operative than those who know that their careers have reached a cul-de-sac

Table 6.6 indicates that the majority of respondents, 514 (92.5%) agreed that educators who were aware that they stand a chance to be promoted were more co-operative than those who know that their careers have reached a cul-de-sac. Institutional leadership and management should design activities and programmes that enhance personnel's motivation and effectiveness (Westerman & Donoghue 1989). From the data presented it may be concluded that schools should ensure that all educators endeavour for sustained professional development (cf.3.8.1).

**Item 5** Ambivalence about delegation of work creates conflict and it is the basis for educators' despondency

Table 6.6 indicates that the majority of respondents, 538 (96.7%) agreed that ambivalence about delegation of work creates conflict and it is the basis for educators' despondency. Robinson (1992) observes that there is a need in schools to reduce functional narrowness and developing broader operational perspectives for educators. It is concluded that adoption of the principle of fairness in delegation of work is necessary in order to eliminate discontentment and employee indifference in the schools (cf. 3.9.2).

**Item 6** Educators perform below expected standards because they know that schools do not offer incentives for outstanding work

Table 6.6 indicates that the majority of respondents, 510 (91.7%) strongly agree that educators perform below expected standards because they know that schools do not offer incentives for outstanding work. Walton (1985) contends that fair compensation should be provided in order that remuneration is equal to the amount of work that has been done. It may be construed that educators perform below expected standards because they know that schools do not offer incentives

for outstanding work, and to correct this state of affairs schools should provide incentives for outstanding work (cf.3.8.1).

**Item 7 Favouritism by management leads to low output from educators**

Table 6.6 indicates that the majority of respondents, 514 (92.5%) agreed that favouritism by management lead to low output from educators. Favouritism breaks teamwork, and Werner (2002) notes that teamwork allows greater participation in the workplace. It would appear that favouritism by management leads to low output from educators and consequently, the application of the principles of equity and equality is significant in the schools.

**Item 8 Educators who are better paid are more dedicated to their work than educators earning low salaries**

Table 6.6 indicates that 472 (84.9%) respondents agreed with the statement that educators who were better paid were more dedicated to their work than educators earning low salaries. Winning companies use salaries to have access to, and generate dedicated workers (Hagel 2003). It may be concluded that educators should be better paid to get them more dedicated to their work.

**Item 9 The restructuring programme affects educators' morale and motivation**

Table 6.6 indicates that the majority of respondents, 514 (92.5%) agreed that the restructuring programme affects educators' morale and motivation. In the same vein, Bush (1995) notes that school managers should work with colleagues to ensure that new policy initiatives are carried through into the school. Change is always painful, and it is therefore necessary that managers take time to reassure subordinates that change is necessary in schools. It can be concluded that while the restructuring programme affects educators' morale and motivation, the work of school managers is to ensure that educators embrace change with an open mind and not see change processes as deliberate victimisation.

Item 10 Schools lose enthusiastic and effective educators to competitors in the private sector since these competitors offer them attractive salary packages

Table 6.6 indicates that the majority of respondents, 538 (96.7%) agreed that schools lose enthusiastic and effective educators to competitors in the private sector since these competitors offer them attractive salary packages and incentives. One of the greatest threats to more established companies is talent arbitrage opportunity that is available to new entrants since new entrants lure talent from them by offering better salary packages, opportunities for value creation and talent development (Hagel 2003:4).

The following discussion focuses on explanation of mean score ranking on pay and incentives.

Table 6.7: Mean score ranking on pay and incentives

Rank	Item number	Item	Mean	SD
2	7.1	Management knows that needs satisfaction is linked to educators' level of motivation	4.49	0.56
10	7.2	Management ensures that teaching is intrinsically meaningful and challenging for educators	3.96	0.14
7	7.3	Educators are given recognition for good work	3.99	0.15
4	7.4	Educators who know that they stand a chance to be promoted are more co-operative than those who know that they have reached a cul-de-sac in their careers	4.19	0.48
5	7.5	Ambivalence about delegation of work creates conflict	4.17	0.21
1	7.6	Educators perform below standard because they know that the school does not offer any incentive for outstanding work	4.52	0.48
7	7.7	Management is responsible for low output there is favouritism	3.99	0.15
3	7.8	Educators who are better paid are more dedicated to their work than those who earn less	4.22	0.40
7	7.9	Restructuring affects educators' motivation and morale	3.99	0.15
5	7.10	Schools lose enthusiastic educators to competitors in the private sector since these competitors offer them attractive salaries and incentives	4.17	0.21

From Table 6.7 it is evident that the item ranked highest is 7.6 with its mean = 4.52 and standard deviation = 0.48. The lowest ranked item is 7.2 with its mean = 3.96 and standard deviation = 0.14. From the response rate it may be concluded that educators performed below expected standards because they were not well paid (cf 1.5), and management did not ensure that teaching was intrinsically meaningful to educators and learners. It may be concluded that lack of motivation may be the cause of below standards of performance as indicated earlier (cf 1.5).

The following discussion focuses on an analysis of responses to questionnaire items on talent creation in schools.

## 6.7 TALENT CREATION IN SCHOOLS

Global competitiveness demands that schools be able to move fast and educators to make decisions and implement changes quickly. When the people who actually do the work were allowed to make their own job-related decisions, both the speed and quality of those decisions often improve the quality of their work. Swanepoel, Erasmus, Van Wyk & Schenk (2000) note that adoption of new management and leadership strategies in schools is necessitated by the quest for co-operative governance as well as participatory management and leadership. Effective participatory management and leadership are indispensable for creation of school conditions in which common ideas are used to generate collective and shared visions focused at effective accomplishment of school aims (Falikowski 2002:2).

In this section variables that were tested included:

- Integration;
- Competitiveness; and
- Responsiveness to needs.

The following Table 6.8 provides a summary of responses to items on talent creation in schools.

Table 6.8: Talent creation in schools

Items	SA		A		U		D		SD	
	F	%	F	%	F	%	F	%	F	%
8.1 Talent creation is linked to the needs of the school	244	43.9	242	43.5	66	11.9	4	0.7		
8.2 The school promotes integrated development of talents, skills, knowledge, values and attitudes	15	2.7	499	89.7	40	7.2	2	0.4		
8.3 A diversified school programme is adopted	242	43.5	230	41.4	76	13.7	8	1.4		
8.4 Educators are encouraged to have a variety of skills and knowledge	340	61.2	174	31.4	24	4.3	14	2.5	4	0.7
8.5 An inclusive approach is adopted in the school	36	6.5	478	86.0	40	7.2	2	0.4		
8.6 Educators are encouraged to acquire different skills	478	86.0	36	6.5	2	0.4	40	7.2		
8.7 Talent utilisation is linked to effectiveness and productivity	150	26.9	288	51.8	108	19.4	10	1.8		
8.8 The school offers a diversified curriculum	242	43.5	230	41.4	76	13.7	8	1.4		
8.9 The school has a network of relations with other agencies	114	20.5	358	64.4	74	13.3	4	0.7	2	0.4
8.10 Talent creation is done in line with the principles of equity and equality	36	6.5	478	86.0	40	7.2	2	0.4		

#### Item 1 Talent creation is linked to the needs of the school

Table 6.8 indicates that the majority of respondents, 486 (87.49%) agreed that talent creation is linked to the needs of the school. Robinson (1992) is of the opinion that talent creation in schools should be linked to the creation of opportunities that develop cross-functional or multi-disciplinary teams. It may be concluded that talent creation should be linked to the needs of the school (cf.3.5).

#### Item 2 The school promote an integrated development of talents, skills, knowledge, values and attitudes among learners and educators

Table 6.8 indicates that the majority of respondents, 514 (92.5%) agreed that the school promote an integrated development of talents, skills, knowledge, values and attitudes among learners and educators. According to Mintzberg (1992),

structures schools should ensure co-ordination of tasks and ensure multi-skilling of personnel. It may be concluded that a school should promote an integrated development of talents, skills, knowledge, values and attitudes among learners and educators (cf. 3.5.1).

**Item 3** A diversified school programme is adopted to address diverse needs and talents of learners and educators

Table 6.8 indicates that the majority of respondents, 472 (84.9%) agreed that a diversified school model is adopted to address diverse needs and talents of learners and educators. Harris and Day (2003) are of the view that effective leaders sustain innovation and they ensure capacity building for school improvement. It is concluded that diversification of educational programmes is necessary in schools.

**Item 4** Educators are encouraged to have a variety of skills and knowledge to provide for and respond to the needs of all learners

Table 6.8 indicates that the majority of respondents, 514 (92.5%) agreed that educators were encouraged to have a variety of skills and knowledge to provide for and respond to the needs of all learners. Acquisition of diverse skills entails instrumental criteria of education relevance especially in relation to workforce needs in the present-day (Millar 1991). The data collected indicates that educators should be encouraged to have a variety of skills and knowledge to provide for and respond to the needs of all learners.

**Item 5** An inclusive approach is adopted in the school with an aim of catering for the diverse needs of all learners

Table 6.8 indicates that the majority of respondents, 514 (92.5%) agreed that an inclusive approach is adopted in the school with an aim of catering for the diverse needs of all learners. According to RSA (1998) there is a need for an

organisational framework to devise and implement national, sectoral and workplace strategies that accommodate the citizenry at large. It may be concluded that an inclusive approach should be adopted in the school with an aim of catering for the diverse needs of all learners (cf. 4.2.2).

Item 6 While educators are allowed to specialise, they are also encouraged to acquire different skills as preparation for restructuring the education sector

Table 6.8 indicates that the majority of respondents, 514 (92.5%) agreed that while educators were allowed to specialise, they were also encouraged to acquire different skills as preparation for possible restructuring in the education sector. Van der Stoep and Louw (1991) contend that lifelong learning creates an infrastructure for continuing education and training in order to accommodate large numbers of people who need re-training in the workplaces characterised by skill obsolescence. It may be concluded that while educators were allowed to specialise, they should also be encouraged to acquire different skills as preparation for possible restructuring in the education sector.

Item 7 Talent utilisation is linked to effectiveness and productivity in the school

Table 6.8 indicates that the majority of respondents, 438 (78.7%) agreed that talent utilisation is linked to effectiveness and productivity in the school. From the point of view of economic growth and development, it is the quality of the workforce and not the size of the workforce that counts (Haasbroek 2002:442). It may be deduced that talent utilisation in schools is linked to effectiveness and productivity.

Item 8 The school offers a diversified curriculum to suit the diverse needs and talents of the learners

Table 6.8 indicates that the majority of respondents, 472 (84.9%) agreed that the school offers a diversified curriculum to suit the diverse needs and talents of the

learners. The Department of Education (2001:43) notes that quality education includes skills and abilities of all learners who will be regarded as employable, creative, confident as well as possessing the necessary values and attitudes. It may be concluded that schools should offer diversified curricula in order to respond to diverse needs and talents of learners.

Item 9 The school has a network of relations with other agencies and it uses the expertise provided by these agencies to promote inclusive education

Table 6.8 indicates that 472 (84.9%) respondents agreed with the statement that the school has a network of relations with other agencies. The school should have intense focus on customers and thus, it should interact continuously with its stakeholders (Dawson 1993). It may be concluded that schools should have networks of relations with other agencies in order to use the expertise provided by these agencies (cf.3.2).

Item 10 Talent creation is done in line with the principles of equity and equality and therefore a variety of capacity building programmes run simultaneously in the school

Table 6.8 indicates that the majority of respondents, 514 (92.5%) agreed that talent creation is done in line with the principles of equity and equality. The conversion of schools into learning organisations is characterised by emphasis on inquiry, creativity, social responsibility, justice, and problem solving (SYNCOM 1991). It may be concluded that talent creation should be done in line with the principles of equity and equality.

From the preceding discussion it seems obvious that talent creation is necessary in schools not only to assist educators to unfurl their potential, but also to provide for the diverse needs of learners. Having provided a summary of responses to items on talent creation in schools, as well as giving the researcher's interpretation of

the data gathered on the same items, focus will now be on the mean score ranking of each item.

Table 6.9: Mean score ranking on talent creation in schools

Rank	Item number	Item	Mean	SD
3	8.1	Talent creation is linked to the needs of the school	4.30	0.49
10	8.2	The school promotes integrated development of talents, skills, knowledge, values and attitudes	3.94	0.11
4	8.3	A diversified school model is adopted to address diverse needs of learners and educators	4.27	0.45
2	8.4	Educators are encouraged to have a variety of skills and knowledge to respond to the needs of all learners	4.50	0.56
8	8.5	An inclusive approach is adopted in the school	3.99	0.15
1	8.6	While educators are allowed to specialise, they are also encouraged to acquire different skills	4.71	0.64
6	8.7	Talent utilisation is linked to effectiveness and productivity in the school	4.04	0.53
4	8.8	The school offers a diversified curriculum to suit the diverse needs and talents of the learners	4.27	0.45
7	8.9	The school has a network of relations with other agencies	4.01	0.40
8	8.10	Talent creation is done in line with the principles of equity and equality	3.99	0.15

From Table 6.9 it can be deduced that the highest ranked item is 8.6 with its mean = 4.71 and standard deviation = 0.64. It may thus be concluded that educators were encouraged to specialise and to acquire different skills. Notably, a specialist with diverse skills in the education enterprise is more flexible than the one who possesses only one skill. In the same vein, the lowest ranked item is 8.2 with its mean = 3.94 and standard deviation = 0.11, and it may be concluded that schools did not encourage an integrated development of talents, skills, values and attitudes. In parallel disposition, Samuel (1992:116) is of the opinion that integration of education [theory] and training [practice] in order to create a holistic approach to life. It can be concluded that the realignment of educator development programmes in order to forge integration of skills, knowledge, attitudes and values is imperative in order to create a holistic conception of learning and living. The following discussion focuses on analysis of responses to questionnaire items on change management in schools.

## 6.8 CHANGE MANAGEMENT IN SCHOOLS

The dualism of change management originates from the fact that just as change is simultaneously a highly personal experience, it is embedded in the structure, norm, and idiosyncrasies of the schools. For example people engage in activities aimed at constructive improvement of the quality of their life. Variables that were used in the study included: capacity building, fear, and vision formulation. The following discussion focuses on change management.

Table 6.10: Change management

Items	SA		A		U		D		SD	
	F	%	F	%	F	%	F	%	F	%
9.1 Management capacitates educators adapt to changes in the schools situation	350	61.2	164	31.4	24	4.3	14	2.5	4	0.7
9.2 The school has functioning linkages with its environment	24	4.3	490	88.1	40	7.2			2	0.4
9.3 Management understands that change is typified by fear, sense of loss and disruptions in the school	36	6.5	478	86.0			40	7.2	2	0.4
9.4 Management organises workshops for stakeholders in order to explain the impact of the envisaged changes on the school and its members	174	31.3	340	61.2	24	4.3	14	2.5	4	0.7
9.5 Change management is not done in isolation	112	20.1	426	76.6	18	3.2				
9.6 Management does not adopt changes verbatim as they had been instituted in other situations,	346	62.2	164	29.5	38	6.8	5	1.1	2	0.4
9.7 Changes in the school are carefully planned and managed and they are introduced gradually in order not to disrupt the school's operational programmes	36	6.5	478	86.0	40	7.2	2	0.4		
9.8 Changes in the school are negotiated with the affected parties	114	20.5	358	64.4	74	13.3	4	0.7	2	0.4
9.9 Changes are effectively implemented when there is a clearly articulated vision	36	6.5	478	86.0	40	7.2	2	0.4		
9.10 Change management requires that stakeholders make significant paradigm shifts	112	20.1	426	76.6	18	3.2				

**Item 1 Management capacitates educators adapt to changes in the schools situation**

Table 6.10 indicates that the majority of respondents, 514 (92.5%) agreed that management capacitates educators adapt to changes in the schools situation. According to Dawson (1993), educator empowerment would assist by giving them to deal with changes in the workplace. Surely, management should capacitate educators adapt to changes in the schools situation.

**Item 2 The school has functioning linkages with their external environments**

Table 6.10 indicates that the majority of respondents, 514 (92.5%) agreed that schools have functioning linkages with their external environments. For many years schools operated in isolation and they were oblivious of their roles in society (Mncwabe 1990). It may be concluded that schools should have functioning linkages with their external environment and they should be in touch with the needs of their clients.

**Item 3 Management acknowledges that change is typified by fear, sense of loss and disruptions in the school**

Table 6.10 indicates that the majority of respondents, 514 (92.5%) agreed that management acknowledges that change is typified by fear, sense of loss and disruptions in the school. Moloj (1998) notes that change is typified by skill obsolescence and an employee that was regarded as skilled in the present-day may be unskilled the following day. Management should develop strategies that would assist subordinates to face changes in the school situation with an open mind and positive attitudes. It is observed that change is inevitable in human life, and therefore it is necessary that human beings be assisted to be prepared to change their methods of doing things when new methods are introduced.

**Item 4 Management organises workshops for stakeholders in order to explain the impact of the envisaged changes on the school and their members**

Table 6.10 indicates that the majority of respondents, 514 (92.5%) agreed that management organises workshops for stakeholders in order to explain the impact of the envisaged changes on the school and their members. Change is not a once off activity, it is a continuous activity aimed at aligning the school's operational plans to the needs in the contemporary reality (Robinson 1992). The data collected indicated that the majority of respondents were of the opinion that management should organise workshops for stakeholders in order to explain the impact of the envisaged changes on the school and their staff members.

**Item 5 Change management is not done in isolation**

Table 6.10 indicates that the majority of respondents, 538 (96.7%) agreed that change management is not done in isolation. Vaida (2003) is of the opinion that schools need an awareness of consequences of eccentricity in a changing environment. It may be concluded that change management should not be done in isolation and experts who understand change processes be invited to assist the school to deal with change.

**Item 6 Management does not adopt changes verbatim as they had been instituted in other situations, but rather they adapt these changes to their unique situation**

Table 6.10 indicates that the majority of respondents, 510 (91.7%) agreed that management does not adopt changes verbatim as they had been instituted in other situations, but rather they adapted changes to their unique situation. According to Robinson (1992), changes should be instituted with due regard of schools' unique environments and organisational cultures. It may be concluded that management should not adopt changes verbatim as they had been instituted in other situations.

**Item 7** Changes in the school are negotiated with the affected parties and attempts are made to reach compromises when necessary

Table 6.10 indicates that the majority of respondents, 514 (92.5%) agreed that changes in the school were negotiated with the affected parties and attempts were made to reach compromises when necessary. Participation in the change process should be encouraged in order to forge a shared vision for changes in schools (Sono). It may be concluded that changes in the school should be negotiated with the affected parties and attempts should be made to reach compromises when necessary (cf. 3.9.1).

**Item 8** Changes in the school are carefully planned and they are introduced gradually in order not to disrupt the school's operational model

Table 6.10 indicates 472 (84.9%) respondents agreed with the statement that changes in the school were carefully planned and they were introduced gradually in order not to disrupt the school's operational model. According to Hargreaves and Hopkins (1991), school improvement plans should be carefully planned and effectively managed. It may be concluded that changes in the school should be carefully planned and they should be introduced gradually in order not to disrupt the school's operational model (cf. 2.5.4).

**Item 9** Changes are effectively implemented when there is a clearly articulated vision of what is to be achieved by the school

Table 6.10 indicates that the majority of respondents, 514 (92.5%) agreed that changes were effectively implemented when there is a clearly articulated vision of what is to be achieved by the school. According to Robinson (1992), change is successful when it is recognised that it will spread through the school at different rates since 'big bang' changes are neat on paper but rarely work out nicely in practice. It may be concluded that changes would be effectively implemented when there is a clearly articulated vision of what is to be achieved by the school.

**Item 10** Change management requires that stakeholders make significant paradigm shifts in their attitudes and behaviours

Table 6.10 indicates that the majority of respondents, 538 (96.7%) agreed that change management required that stakeholders make significant paradigm shifts in their attitudes and behaviours. There should be fundamental change in thought, perceptions, and values in order to create a clear vision for a school (Capra 1982). It may be concluded that change management requires that stakeholders make significant paradigm shifts in their attitudes and behaviours.

**Table 6.11: Mean score ranking on change management**

Rank	Item number	Item	Mean	SD
1	9.1	Management capacitates educators adapt to changes in the schools situation	4.51	0.57
9	9.2	The school has functioning linkages with its external environment	3.96	0.15
10	9.3	Management understands that change is typified by fear, sense of loss and disruptions in the school	3.91	0.38
3	9.4	Management organises workshops for stakeholders in order to explain the impact of the envisaged changes on the school and its members	4.20	0.42
4	9.5	Change management is not done in isolation	4.17	0.21
2	9.6	Management does not adopt changes verbatim as they had been instituted in other situations,	4.50	0.48
7	9.7	Changes in the school are carefully planned and managed and they are introduced gradually in order not to disrupt the school's operational programmes	3.99	0.15
6	9.8	Changes in the school are negotiated with the affected parties	4.02	0.40
7	9.9	Changes are effectively implemented when there is a clearly articulated vision	3.99	0.15
4	9.10	Change management requires that stakeholders make significant paradigm shifts in their attitudes and behaviours	4.17	0.21

Table 6.11 indicates a high mean score for item 9.1 at 4.51 and standard deviation at 0.57. It appears that management took capacity building seriously, and consequently staff was afforded opportunities for professional development. The lowest score is on item 9.3 with its mean at 3.96 and standard deviation at 0.15. From the data analysis and interpretation it may be concluded that management was half-hearted when coming to the issue of change management, and it did not provide intervention strategies to assist educators cope with changes in the school.

McKay and Romm (1992:109) contend that the community –is not seen as a unitary entity; but it is seen as a collective of individuals who are [or who ought to be] accountable to each other.

## 6.9 MANAGEMENT AND ORGANISATIONAL STRATEGIES

In a free market economy there would be a need for integrated operational strategies. Just as empowerment starts with leadership, it also requires the commitment of all stakeholders to accept responsibility for development of the organisation. The following variables were crucial in the study: representatively, transformation; and effectiveness.

Table 6.12: Organisational strategies in schools

Items	SA		A		U		D		SD	
	F	%	F	%	F	%	F	%	F	%
10.1 Educators are represented in all decision-making structures	264	47.5	222	39.9	66	11.9	4	0.7		
10.2 Rules, and regulations are understood by stakeholders	244	43.9	242	43.5	66	11.9	4	0.7		
10.3 Educators are given roles to perform in the school	284	51.1	198	35.6	74	13.3				
10.4 Management uses transformational leadership	112	20.1	426	76.6			18	3.2		
10.5 Management views all educators as self-motivated	348	62.9	164	29.5	38	6.8	6	1.1		
10.6 The vision and mission of the school are understood by all	36	6.5	478	86.0	40	7.2	2	0.4		
10.7 Stakeholders participate in formulation of plans	340	61.2	174	31.4	24	4.3	14	2.5	4	0.7
10.8 Educational plans are SMART	288	51.8	162	29.1	10	18.3	4	0.7		
10.9 The school has clear policies on quality assurance and appraisal	242	43.5	230	41.4	76	13.7	8	1.4		
10.10 Effective leadership is enhanced by respect, trust and understanding	36	6.5	478	86.0	40	7.2	2	0.4		

Item 1 Educators are represented in all decision-making structures in the school

Table 6.12 indicates that the majority of respondents, 486 (87.4%) agreed that educators were represented in all decision-making structures in the school.

**Representation** establishes a sense of understanding of the need for commitment to organisational vision (Hoy & Miskel 1991). It may be concluded that educators should be represented in all decision-making structures in the school (cf 3.9.1).

#### All stakeholders understand item 2 Rules, procedures, and regulations

Table 6.12 indicates that the majority of respondents, 486 (87.4%) agreed that all stakeholders understood rules, procedures, and regulations. Werner (2002) is of the opinion that organisations need a culture of continuity. It may be concluded that all stakeholders should understand rules, procedures, and regulations.

#### Item 3 Educators are given roles to perform in the school and they are also given support by management

Table 6.12 indicates that the majority of respondents, 482 (86.7%) strongly agree that educators were given roles to perform in the school and they were also given support by management. Greefield and Ribbins (1993:260) note that educational leaders should look at issues in schools in a fresh perspective. It may be concluded that educators should be given roles and support to perform these roles in the school (cf. 4.4).

#### Item 4 Management uses transformational leadership

Table 6.12 indicates that the majority of respondents, 538 (96.7%) agreed that management use transformational leadership not transactional leadership style. Managers should develop mechanisms for involving team members as business partners in determining the company's success or failure (Blanchard et al. 1999).

#### Item 5 Management views all educators as self-motivated, committed, responsible and creative people

Table 6.12 indicates that the majority of respondents, 512 (92.4%) agreed that management views all educators as self-motivated, committed, responsible and creative people. Accordingly, Stuart (1998) notes that educators want to improve

their performance levels, and they also want to take appropriate actions to remedy deficiencies in their performance. From the preceding statement it may be construed that management should view all educators as self-motivated, committed, responsible and creative people.

Those who had links with the school understand item 6 the vision and mission of the school are clearly depicted and them

Table 6.12 indicates that the majority of respondents, 514 (92.5%) agreed that the vision and mission of the school were clearly depicted. Teams and groups linked to the organisation should articulate the organisation's vision in their operations (Werner 2002). The vision and mission of the school should be clearly depicted and should be understood by those who had links with the school (cf. 3.4.2).

Item 7 Stakeholders participate in formulation and re-formulation of school programmes and operational plans

Table 6.12 indicates that the majority of respondents, 514 (92.5%) agreed that stakeholders participate in formulation and re-formulation of school programmes and operational plans. Hoy and Miskel (1991) observe that stakeholders develop a culture that serves as a normative guide for group behaviour and management.

Item 8 Educational plans are specific, have measurable outcomes, achievable goals, reasonable expectations and time-bound action plans

Table 6.12 indicates that the majority of respondents, 450 (80.9%) agreed that educational plans were specific, had measurable outcomes, achievable goals, reasonable expectations and time-bound action plans. It may be concluded that educational plans should be specific, measurable, achievable, reasonable and time-bound.

Item 9 Schools have clear policies on standards, quality assurance and appraisal

Table 6.12 indicates that the majority of respondents, 472 (84.9%) agreed that schools had clear policies on standards, quality assurance and appraisal. It is concluded that schools should have clear policies on standards, quality assurance and appraisal (cf. 3.4.1).

Item 10 Effective leadership is enhanced by respect, trust and understanding between the management and all stakeholders

Table 6.12 indicates that the majority of respondents, 514 (92.5%) agreed that effective leadership is enhanced by respect, trust and understanding. The school manager's role is to coach, stimulate, direct and co-ordinate groups and individuals to attain designated tasks (Dawson 1993). It may be concluded that respect, trust and understanding should be enhanced in schools.

Table 6.13 Mean score ranking on organisational strategies

Rank	Item number	Item	Mean	SD
4	10.1	Educators are represented in all decision-making structures in the school	4.34	0.51
6	10.2	Rules, procedures, and regulations are understood by all stakeholders	4.31	0.49
3	10.3	Educators are given roles to perform in the school and they are also given support	4.38	0.46
8	10.4	Management uses transformational leadership	4.14	0.31
1	10.5	Management views all educators as self-motivated, committed, responsible and creative people	4.54	0.45
9	10.6	The vision and mission of the school are understood by those who had links with the school	3.99	0.15
2	10.7	Stakeholders participate in formulation and reformulation of school programmes and plans	4.49	0.56
5	10.8	Educational plans are specific, measurable, achievable, reasonable, and time-bound	4.32	0.63
7	10.9	The school has clear policies on quality assurance and appraisal	4.27	0.45
9	10.10	Effective leadership is enhanced by respect, trust and understanding.	3.99	0.15

Table 6.13 indicates that the highest ranked item is 10.5 with its mean = 4.54 and standard deviation = 0.45. It may be concluded that management viewed all educators as self-motivated and creative. The lowest ranked items were 10.10 and 10.6 with their means = 3.99 and standard deviations = 0.15. It is noted that schools' visions dictate their operations, and thus there is a need for all those linked to the school to engage in dialogue, debate and reflection on what the school wants to achieve (Hicks 1990:41).

## 6.10 SCHOOL EFFECTIVENESS AND EFFICIENCY

In many present-day organisations, success is assessed and measured according to the attention given to human resource. One of the incontestable and unchangeable notions about schools is that effective teaching is the retracts from effective management of teaching processes. For this reason, Van der Westhuizen (1999:235) argues that:

... The execution of management tasks is an interactive activity that must take into account the dynamics of teaching and education. The purpose of management in schools is to realise effective teaching and education. This means that management cannot be obtained through didactic skills only... it requires purposeful training...

The following variables were used in the study:

- Quality assurance,
- Development planning, and
- Development.

The responses were computed, and Table 6.14 presents a summary of the collected responses.

Table 6.14: School effectiveness in meeting targets

Items	SA		A		U		D		SD	
	F	%	F	%	F	%	F	%	F	%
11.1 Management provides academic leadership	350	62.9	164	29.5	24	4.3	14	2.5	4	0.7
11.2 Management has a high expectation for learners' performance	36	6.5	478	86.0	40	7.2	2	0.4		
11.3 Learners' progress is continuously assessed	242	43.5	230	41.4	76	13.7	8	1.4		
11.4 Educators are exposed to a developmental appraisal system	340	61.2	174	31.4	24	4.3	14	2.5	4	0.7
11.5 The school curriculum is relevant to the needs of clients	242	43.5	244	43.9	66	11.9	4	0.7		
11.6 Educators' training and development is linked to the needs of educators and the schools	35	6.3	479	86.2	40	7.2	2	0.4		
11.7 There is constant feedback on performance	150	26.9	288	51.8	108	19.4	10	1.8		
11.8 The school uses a management information system to record pass or success rates	242	43.5	230	41.4	76	13.7	8	1.4		
11.9 The schools has a development plan	114	20.5	358	64.4	74	13.3	4	0.7	2	0.4
11.10 The schools has a plan to control and assure quality in teaching and learning	36	6.5	478	86.0	40	7.2	2	0.4		

Item 1 The management provides strong academic leadership to both educators and learners

Table 6.14 indicates that the majority of respondents, 514 (92.5%) agreed that management provides strong academic leadership to both educators and learners. According to Walton (1985), management should provide for growth and security in schools by providing appropriate training to avert skill obsolescence. The data collected indicates that management should provide strong academic leadership to both educators and learners.

**Item 2 Management and educators have high expectations for learners' performance**

Table 6.14 indicates that the majority of respondents, 514 (92.5%) agreed that the management and educators have high expectations for learners' performance. Legotlo et al. (2002) note that in effective schools there is emphasis on high expectations for learner's performance. It may be concluded that management and educators should have high expectations for learners' performance.

**Item 3 Learners' progress is continuously assessed to ensure quality in educative teaching**

Table 6.14 indicates that the majority of respondents, 472 (84.9%) agreed that learners' progress is continuously assessed to ensure quality in educative teaching. Continuous assessment assists by necessitating correction of deviations from set standards and plans (O'Donnell 1992). Notably, assessment should entail an understanding of the life as an integrated reality in which fundamental aspirations of an individual and society cohere. It is concluded that learners' progress should be continuously assessed to ensure quality in educative teaching.

**Item 4 Educators are exposed to an integrated quality and performance system**

Table 6.14 indicates that the majority of respondents, 514 (92.5%) agreed that educators were exposed to an integrated quality and performance system. Integrated human resources development is in vogue in the present dispensation, and in order to optimise the potential of educators there is a reciprocal need to expose educators to an integrated quality and performance system (Mabale 2004). It is necessary to bear in mind that people cannot be developed, but they can develop themselves and consequently, opportunities should be created for individuals to improve their output and quality in products. The data collected indicates that educators should be exposed to an integrated quality and performance system.

**Item 5 The school curriculum is relevant to the needs and interests of the school's clients**

Table 6.14 indicates that the majority of respondents, 486 (87.4%) agreed that the school curriculum is relevant to the needs and interests of the school's clients. According to Van Rensburg (1990), that the formal sector expects the schooling system to produce highly skilled and knowledgeable graduates who may fit easily into the labour market. As a result, it may be concluded that the school curriculum should be relevant to the needs and interests of the school's clients.

**Item 6 Educators' training and development programmes are linked to the needs of educators and the school**

Table 6.14 indicates that the majority of respondents, 514 (92.5%) agreed that educators' training and development programmes were linked to the needs of educators and the school. Yong and Hoeh (1999:125) contend that the manager's expectation are fundamental for educators' behaviour and performance in the school situation. It is further noted that all people are unique, and consequently staff development programmes should develop and sustain optimisation of unique potential and latent talents of educators. It may be concluded that educators' training and development programmes should be linked to the needs of educators and the school (cf.3.4).

**Item 7 There is feedback on performance and stakeholders are informed about successes of the schools**

Table 6.14 indicates that the majority of respondents, 438 (78.7%) agreed that there is constant feedback on performance of the schools. The school manager's roles include evaluating educators' performance and conveying the results of evaluation (Bath 2003). It may be deduced that there is a need for feedback on the performance of the school to both educators and other stakeholders using internal and external feedback loops.

**Item 8** The school used a management information system to record its successes

Table 6.14 indicates that the majority of respondents, 472 (84.9%) agreed that the school uses a management information system to record the school's successes. According to Lam (2004) explicit knowledge about the school may be acquired, recorded and codified, as well as transferred through logical deductions. It is concluded that a management information system [MIS] is essential for record-keeping and information dissemination in schools.

**Item 9** Schools had a development plan that is based on the needs analysis of both schools and the communities

Table 6.14 indicates that 472 (84.9%) respondents agreed that schools have development plans that were based on their needs. Due to situational differences school plans are circumscribed due to environmental limitations facing schools in their different localities (Van der Westhuizen 1999). For example, school plans should emphasise global development and inculcation of values and attitudes that address cross-cultural conflict, xenophobia and ethnocentricity. It may be concluded that development plans should be relevant to the school's unique environment.

**Item 10** Schools have well-developed plans to control and assure quality in teaching and learning

Table 6.14 indicates that the majority of respondents, 514 (92.5%) agreed that schools have well-developed plans to control and assure quality in teaching and learning. Dawson (1993) notes that control measures produce better value for money. It may be concluded that schools should have well-developed plans to control and assure quality in teaching and learning (cf. 4.3).

The following discussion focuses on mean score ratings on school effectiveness in meeting targets.

Table 6.15: Mean Score rating on school effectiveness in meeting targets

Rank	Item No	Item	Mean	SD
2	11.1	Management provides strong academic leadership to both educators and learners	4.51	0.57
8	11.2	Management and educators had a high expectation for learners' performance	3.99	0.15
4	11.3	Learners' progress is continuously assessed to ensure quality in educative teaching	4.27	0.45
1	11.4	Educators are exposed to a developmental appraisal system in order to identify and close gaps in performance	4.65	0.56
3	11.5	The school curriculum is relevant to the needs and interests of the school's clients	4.30	0.49
8	11.6	Educators' training and development programmes are linked to the needs of educators and the schools	3.99	0.15
6	11.7	There is constant feedback on performance and the stakeholders are informed about successes of the schools	4.04	0.53
4	11.8	The school uses a management information system to record pass or success rates	4.27	0.45
7	11.9	The schools has a development plan that is based on the needs analysis of both the schools and the communities	4.02	0.40
8	11.10	The schools has a well developed plan to control and assure quality in teaching and learning, as well as to record areas to be improved	3.99	0.15

Table 6.16 indicates that item 11.6 is the highest ranked with the mean = 4.65 and the standard deviation = 0.56. The lowest ranked items were 11.2, 11.8 and 11.10 with the mean = 3.99 and standard deviation = 0.15. From the data presented it may be concluded that:

- Educators were exposed to a development appraisal system;
- There was an attempt to close gaps in performance;
- Management and educators did not have high expectations about learners' performance;
- Schools did not use management information systems to record their successes and failures; and
- Schools did not have systems to assure quality in teaching and learning.

The following discussion focuses on tests for statistical significance.

## 6.11 TESTS FOR STATISTICAL SIGNIFICANCE ON THE ESSENCE OF MANAGEMENT AND LEADERSHIP DEVELOPMENT

The following discussion presents tests for statistical significance for the essence of a management and leadership model for primary schools. As a norm, a series of tests were conducted and the data acquired was interpreted and recorded indicating frequencies, Chi-square test results and results of tests for symmetries. In addition, it is essential that readers understand the approach followed in collecting, collating, analysis and recording of data. For example, hypotheses were formulated, levels of significance were founded and degrees of freedom were calculated. In conclusion, the hypotheses were either accepted or rejected at the 5% level of significance.

Typical of quantitative research approaches and methodologies, symmetric tests measuring the distribution of scores were conducted according to the principles:

- For a fully symmetrical distribution: average = median = mode
- For a positive skewed distribution: the average is greater than the median and the median is greater than the mode, and
- For a negatively skewed distribution: the average is less than the median and the median is less than the mode.

In this studies the researcher also used Pearson's co-efficient of skewdness that is defined by:  $sk(P) = \text{average} - \text{mode} \text{ divided by standard deviation}$ . In this case, when  $sk(P)$  is smaller than 0 the distribution is negatively skewed, when  $sk(P)$  is greater than 0 the distribution is positively skewed, and when  $sk(P)$  is equal to 0 the distribution is symmetrical. Data analysis and interpretation in this studies also used Pearson's correlation coefficient [r]. The correlation is a proportion that take values only between -1 and +1 and it is depicted by the following:

r = the correlation coefficient

x = the value of the independent variable

y = the value of the independent variable

$n$  = the number of paired data points.

As one reads the data analysis in this studies one should bear in mind that:

- A low correlation does not necessarily imply that the variables are unrelated, but that the relationship is poorly described by a straight line and a non-linear relationship may well exist;
- Pearson's correlation coefficient does not identify non-linear associations; and
- A correlation does not necessarily imply a cause and effect relationship, but it is just an observation.

From the 556 questionnaires that were received, 2 [two] were found to be inappropriate for use in the analysis. As a result, the analysis was based on the 554 that were found to be usable.

Item 1 There is no significant difference between males and females of stakeholder participation in schools regarding the essence of management and leadership programmes

The premise for this null hypothesis is that there is no significant difference in the views of male and female respondents regarding the essence of stakeholder participation in schools. Table 6.16 presents a summary of responses of both male and female respondents.

Table 6.16: The essence of stakeholder participation in schools

		Stakeholder participation is essential in schools					
		SD	D	U	A	SA	Total
	Male Count		10	20	120	54	204
	% of total		1.8%	3.6%	21.7%	9.7%	36.8%
	Female Count	12	2	108	170	58	350
	% of total	2.2%	0.4%	19.5%	30.7%	10.5%	63.2%
Total	Count	12	12	128	290	112	554
	% of total	2.2%	2.2%	23.1%	52.3%	20.2%	100%

The majority of respondents, 174 (31.4%) males and 228 (47.2%) females affirmed the statement that stakeholder participation is essential in schools. It may be concluded that there are similarities between the views of males and females regarding the significance of stakeholder participation in schools. The information collected through an analysis of the frequency of responses of male and female respondents was used for comparison of the sample statistics to the area of acceptance as indicated by Chi-square and significance of difference tests.

#### Chi-square and significance of difference

	Value	Df	Asymp. Sig. [2-sided]
Pearson Chi-Square	12.890	4	0.012
Likelihood ratio	14.930	4	0.005
Linear-by-linear association	0.145	1	0.704
Number of valid cases	554		

4 cells (40.0%) have expected count less than 5. The minimum expected count is 2.21.

The Chi-square and significance of difference tests indicate that the level of significance in the likelihood ratio is less than 0.05%, and it may be assumed that male and female respondents agree that stakeholder participation is significant for school development. The  $H_0$  is accepted at the 5% level of significance and it is concluded that gender and stakeholder participation were independent. Since gender and stakeholder participation were found not to be associated, there is no need for neither model differentiation in management and leadership development nor is there any evidence of model segmentation by gender.

Item 2 There is no significant difference between males and females regarding the essence of functional structures in schools

Functional structures are essential for effectiveness of management and leadership in schools. Table 6.17 summarises responses of male and female respondents to the assertion that there is no significant difference between males and females regarding the essence of functional structures in schools.

Table 6.17: The essence of functional structures in schools

		Functional structures are necessary for effective school management					
		SD	D	U	A	SA	Total
Gender	Male Count % of total			50 9.0%	104 18.8%	50 9.0%	204 36.8%
	Female Count % of total	12 2.2%	8 1.4%	36 6.5%	198 35.7%	96 17.3%	350 63.2%
Total	Count % of total	12 2.2%	8 1.4%	86 15.5%	302 54.5%	146 26.4%	554 100%

The majority of male and female respondents, 198 (35.7%) and 294 (51.0%) respectively, were in agreement with the statement that functional structures were essential in schools. It may be concluded that male and female respondents have a similar view on the essence of functional structures in schools. A comparison of the sample statistics to the area of acceptance is indicated in Chi-square and significance of difference tests.

#### Chi-square and significance of difference tests

	Value	df	Asymp. Sig. [2-sided]
Pearson Chi-Square	9.197	3	0.027
Likelihood ratio	9.071	3	0.028
Linear-by-linear association	0.579	1	0.003
Number of valid cases	554		

2 cells (25%) have expected count less than 5. The minimum expected count is 1.10.

Chi-square and significance of difference tests indicate that the likelihood ratio is less than 0.05%, and it may be assumed that males and females share the same view regarding the essence of functional structures in schools. Similarly, from the Chi-square table the level of significance is recorded as 0.012, degrees of freedom equal to 3. The critical Chi-square limit is 11.345, while the chi-square sample statistic 9.197 lies within the level of acceptance since it is less than 11.345. The decision rule is:

- Accept  $H_0$  if  $X^2 < 11.345$

- Reject  $H_0$  if  $X^2 > 11.345$ .

The  $H_0$  is accepted at the 5% level of significance and it is therefore concluded that gender and the need for functional structures in schools were independent. Since gender and the need for creating functional structures in schools were found not to be associated, a common model for management and leadership development to both genders may be adopted. These findings suggest that there is no need for neither model differentiation for management and leadership development nor is there any evidence of segmentation by gender.

Item 3 There is no significant difference between males and females regarding the essence of well-developed visions and mission statements for schools

The essence of well-developed visions and mission statements in schools were essential. Table 6.18 presents a synopsis of male and female respondents to the assertion that well-developed visions and mission statements were essential in schools.

Table 6.18: Essence of vision and mission statements for schools

		The vision and mission statements for schools direct everyday operations in schools					
		SD	D	U	A	SA	Total
Gender	Male Count % of total			50 9.0%	104 18.8%	50 9.0%	204 36.8%
	Female Count % of total	12 2.2%	8 1.4%	36 6.5%	198 35.7%	96 17.3%	350 63.2%
Total	Count % of total	12 2.2%	8 1.4%	86 15.5%	302 54.5%	146 26.4%	554 100%

Table 6.18 indicates that the majority of respondents 154 (27.8%) male and female respondents [294 (53.0%)] are in agreement with the statement that a vision and mission statements are essential in schools. The information collected through an analysis of the frequency of responses of male and female respondents was used for

comparison of the sample statistics to the area of acceptance as indicated by Chi-square and significance of difference tests.

#### Chi-square and significance of difference tests

	Value	df	Asymp. Sig. [2-sided]
Pearson Chi-Square	14.805	4	0.005
Likelihood ratio	17.787	4	0.001
Linear-by-linear association	8.050	1	0.823
Number of valid cases	554		

4 cells (40.0%) have expected count less than 5. The minimum expected count is 1.47.

Chi-square and significance of difference tests indicated the likelihood ratio of 0.001 that is less than the level of significance 0.05%, and it may be assumed that male and female respondents agreed that a vision and mission statements are essential in schools. The Chi-square indicates the level of significance as 0.005, and degrees of freedom as 4. The critical Chi-square limit is 14.860, and the chi-square sample statistic 14.805 lies within the range of acceptance 14.860. The decision rule is:

- Accept  $H_0$  if  $X^2 \leq 14.860$
- Reject  $H_0$  if  $X^2 > 14.860$ .

The  $H_0$  is accepted at 5% level of significance and it is concluded that gender and development of shared vision and mission statements were independent. It is observed that since gender and development of a shared vision and mission statements in schools were found not to be associated, a common model for management and leadership development for both genders may be adopted. These findings indicated that there is no model differentiation in management and leadership development nor is there any evidence for differentiation by gender.

Item 4 There is no significant difference between males and females regarding the essence of negotiating changes and consulting stakeholders in matters of common concern in schools

There is a need for negotiation and consultation whenever changes were mooted and implemented in school model or activities. Table 6.19 provides a summary of responses of males and females to the assertion that changes were negotiated and communicated in schools.

Table 6.19: The essence of consultation

		Consultation is essential for effective management and leadership in school					
Gender	Male Count % of total	4 0.7%	52 9.4%	78 14.1%	70 12.6%	204 36.8%	
	Female Count % of total	2 0.4%	2 0.4%	28 5.1%	158 28.5%	160 28.9%	350 63.2%
Total	Count	2	6	80	236	230	554
	% of total	0.4%	1.8%	14.4%	42.6%	41.5%	100%

The majority of respondents, 148 (26.7%) male and 318 (57.4%) female respondents agreed that consultation is essential for effective school management and leadership. It may be concluded male and females agree that consultation is essential for effective school management and leadership.

#### Chi-square and significance of difference tests

	Value	df	Asymp. Sig. [2-sided]
Pearson Chi-Square	19.754	3	0.000
Likelihood-ratio	19.808	3	0.000
Linear-by-linear association	13.435	1	0.000
Number of valid cases	554		

3 cells (25.0%) have expected count less than 5. The minimum expected count is 0.74.

Chi-square and significance of difference tests indicate that the likelihood ration is 0.000 that is less than 0.05%, and it may be assumed that males and females agree that consultation is essential for effective school management and leadership. On

the other hand, the Chi-square presents the degree of freedom as 3. The critical Chi-square limit is 19.754 while the value of the Chi-square sample statistic 14.321 that lies within the area of acceptance 19.754. The decision rule is:

- Accept  $H_0$  if  $X^2 \leq 19.754$
- Reject  $H_0$  if  $X^2 > 19.754$ .

The  $H_0$  is accepted at the 5% level of significance and it is concluded that gender and implementation of changes in the school were independent. It may be concluded that there is no need for neither model differentiation in management and leadership development nor is there any evidence of the necessity for differentiation by gender.

Item 5 There is no significant difference between males and females regarding staff retention rates and providing educators with incentives and rewards

It is essential to keep educators satisfied and consequently, some incentives may assist not only on matters relating to staff motivation, but also to increasing staff retention rates. Table 6.20 summarises responses of males and females to the assertion that incentives and rewards were essential for staff retention rates.

Table 6.20: Staff retention and incentives and rewards

		Incentives and rewards improve staff retention rates in schools					
		SD	D	U	A	SA	Total
Gender	Male Count		10	20	120	54	204
	% of total		1.8%	3.6%	21.7%	9.7%	36.8%
	Female Count	12	2	58	108	170	350
	% of total	2.2%	0.4%	10.5%	19.5%	36.7%	63.2%
Total	Count	12	12	78	228	224	554
	% of total	2.2%	2.2%	14.1%	41.2%	46.4%	100%

The majority of respondents (74.5%) do not believe that the retention of staff is linked to incentives and rewards. The majority of respondents agreed that majority of respondents agreed that staff do not get the incentives and rewards educators get.

Chi-square and significance of  $\chi^2$  (p) tests

	Chi-Square	df	Significance
Program	11.289 <sup>a</sup>	1	.001
Teacher	11.289 <sup>a</sup>	1	.001
Linear-by-linear association	0.14	1	.714
Number of valid cases	11		

a. Cells (10.0%) have expected count less than 5. The minimum expected cell count is 1.00.

Chi-square and significance of  $\chi^2$  (p) tests for the difference between 0.005 that is less than 0.05. In this test, the degrees of freedom is 4 and the Chi-square, which is 13.277, with a significance of 0.012. The Chi-square statistic is 13.277, which is greater than the expected value of 13.277, hence, we consider the difference between the observed and the area of acceptance since  $4^2 < 13.277$ , therefore, we reject  $H_0$ .

- Accept  $H_0$  if  $\chi^2 < 13.277$
- Reject  $H_0$  if  $\chi^2 > 13.277$

The  $H_0$  is accepted if the level of significance is greater than the p-value and distribution rules based on the chi-square distribution. The findings suggest that there is no need for incentive and rewards for staff retention since leadership development is a continuous process that requires a continuous disposition segmentation by guided.

Item 6 There is no significant difference between males and females regarding the essence of assistance provided to educators to improve their teaching skills and professionalism

Educators need support to do their work effectively and efficiently. Table 6.21 provides a summary of responses of males and females to the essence of assistance provided to educators to improve their teaching skills and professionalism.

Table 6.21: The significance of improving teaching skills

		Improvement of teaching skills enhances effective learning				
		D	U	A	SA	Total
Gender	Male Count	4	48	66	86	204
	% of total	0.7%	8.7%	11.9%	15.5%	36.8%
	Female Count	10	32	156	152	350
	% of total	1.8%	5.8%	28.2%	27.4%	63.2%
Total	Count	14	80	222	238	554
	% of total	2.5%	14.4%	40.1%	43.0%	100%

The majority of respondents, 152 (27.4%) male and female respondents, 308 (55.6) agreed that educators should be assisted to improve their teaching skills and professionalism. It is evident that the overwhelming majority of male and female respondents were in agreement with the statement that educators should be assisted to improve their teaching skills and professionalism.

#### Chi-square and significance of difference tests

	Value	df	Asymp. Sig. [2-sided]
Pearson Chi-Square	11.866	3	0.008
Likelihood ratio	11.523	3	0.009
Linear-by-linear association	1.991	1	0.158
Number of valid cases	554		

2 cells (25.0%) have expected count less than 5. The minimum expected count is 2.58.

Chi-square and significance of difference tests present the asymptotic significance as 0.008, and the likelihood ratio as 0.009 that are less than 0.05%. In the light of the given statistical data it may be concluded that both male and female

respondents are in agreement that educators should be assisted to improve their teaching skills and professionalism. In addition, the Chi-square presents the degree of freedom as 3. The value of the Chi-square sample statistic is 11.866 and it lies within the range of the critical Chi-square cut-off line of 12.838. The decision rule is:

- Accept  $H_0$  if  $X^2 \leq 12.838$
- Reject  $H_0$  if  $X^2 > 12.838$ .

The  $H_0$  is accepted at 5% level of significance and it is concluded that gender and enhancing teaching skills and professionalism were independent. Since gender and enhancing teaching skills and professionalism were found to be associated, a common model for management and leadership development to both genders may be adopted.

Item 7 There is no significant difference between males and females regarding the essence of strategic management in schools

Strategic management is essential in most competitive organisations. Table 6.22 summarises the responses of males and females to the assertion that strategic management is essential in schools.

Table 6.22: The essence of strategic management and leadership

		Strategic management and leadership is necessary for preparing schools to deal effectively with changes in their environments				
		D	U	A	SA	Total
Gender	Male Count	42	16	58	88	204
	% of total	7.6%	2.9%	10.5%	15.9%	36.8%
	Female Count	22	20	140	168	350
	% of total	4.0%	3.6%	25.3%	30.3%	63.2%
Total	Count	64	36	198	256	554
	% of total	11.6%	6.5%	35.7%	46.2%	100.0%

The majority of respondents, 146 (26.4%) male and 308 (55.6%) female respondents agreed that strategic management is essential in schools. It may be concluded that males and females agree that strategic management is essential in schools.

#### Chi-square and significance of difference tests

	Value	df	Asymp. Sig. [2-sided]
Pearson Chi-Square	14.603	3	0.002
Likelihood ratio	14.147	3	0.003
Linear-by-linear association	8.461	1	0.004
Number of valid cases	554		

0 cells (0.0%) have expected count less than 5. the minimum expected count is 6.63.

Chi-square and significance of difference tests the likelihood ratio of 0.003 and the Chi-square's asymptotic significance of 0.002 are less than 0.05%. As a result it may be assumed that male and female respondents agree that strategic management is essential in schools. In the same vein, the Chi-square indicates that the degree of freedom is 3. The value of the Chi-square sample statistic is 14.603 while the critical Chi-square limit is 14.321. It is evident that the Chi-square sample statistic (14.603) lies outside the area of acceptance (14.321). The decision rule is:

- Accept  $H_0$  if  $X^2 \leq 14.321$
- Reject  $H_0$  if  $X^2 > 14.321$ .

The  $H_0$  is accepted at the 5% level of significance and it is concluded that gender and strategic management were independent. Since gender and strategic management were found not to be associated, a common strategy for management and leadership development to both genders may be adopted.

The following discussion focuses on location as a variable in the development of a model for management and leadership development for primary schools.

## 6.12 LOCATION AS A VARIABLE IN MANAGEMENT DEVELOPMENT

Cross tabs are provided on location in order to assist readers to understand how respondents fared when their reactions to statements were compared. It is necessary that one comprehends how respondents from different locations respond to questions in order to align the model to their needs. Nine [9] items were selected randomly to test the hypothesis that there are differences between responses of participants due to location. The researcher presents the following Table 6.23 on the case-processing summary to indicate the response rate to statements given.

Table 6.23: Case Processing Summary

	Cases					
	Valid		Missing		Total	
	N	%	N	%	N	%
There should be well-tested programmes for management and leadership development in schools	552	99.3	4	0.7	556	100
The vision and mission statements are the basis for operations in the school	546	98.2	10	1.8	556	100
Staff development should form part of school plans	554	99.6	2	0.4	556	100
Standard setting is essential for improved teaching and learning	552	99.3	4	0.7	556	100
School managers should give constant feedback to stakeholders	554	99.6	2	0.4	556	100
Educators need incentives for improved performance	546	98.2	10	1.8	556	100
Co-operative governance is essential for school development	554	99.6	2	0.4	556	100
Schools should have operational plans	552	99.3	4	0.7	556	100
Functional structures are essential for School development	554	99.6	2	0.4	556	100

From Table 6.23 it can be deduced that 556 responses were used for an analysis of items based on location. The following discussion presents an item analysis on location.

**Item 1 There should be well-tested programmes for management and leadership development in schools**

		There should be well-tested programmes for management and leadership development in schools					
		SD	D	U	A	SA	Total
Location	Rural Count	1	20	4	28	149	202
	% of total	0.2	3.6	0.7	5.1	27.0	36.6
	Urban Count			6	80	264	350
	% of total			1.1	14.5	47.8	63.4
Total	Count	1	20	10	108	413	552
	% of total	0.2	3.6	1.8	19.6	74.8	100

The majority of respondents in rural areas 177 [31.9%] and also in the urban areas 344 [62.3%] agree with the statement that there should be well-tested programmes for management and leadership development in schools. The data was verified through a Chi-square test.

**Chi-Square Tests**

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	9.579 <sup>a</sup>	4	.048
Likelihood Ratio	11.557	4	.021
Linear-by-Linear Association	6.643	1	.010
N of Valid Cases	552		

a. 4 cells (40.0%) have expected count less than 5. The minimum expected count is .17.

From the Chi-square test it may be deduced that there is no significant difference between respondents living in rural areas and urban areas since the data gathered indicates that the asymptotic significance, 0.048; 0.021 and 0.010 (2-sided) is less than 0.05%. It may be assumed that there is no significant difference among

respondents regarding the statement that there should be well-tested programmes for management and leadership development in schools.

#### Item 2 Schools should have operational plans

		Schools should have operational plans					
		SD	D	U	A	SA	Total
Location	Rural Count	16	18	20	39	105	198
	% of total	2.9	3.3	3.7	7.1	19.2	36.3
	Urban Count		4	10	98	236	348
	% of total		0.7	1.8	17.9	43.2	63.7
Total	Count	16	22	30	137	341	546
	% of total	2.9	3.9	5.5	25.1	62.5	100

The majority of respondents in rural areas 144 [26.4%] and also in the urban areas 334 [61.2%] agree with the statement that schools should have operational plans. The data was verified through a Chi-square test.

#### Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	11.224 <sup>a</sup>	3	.011
Likelihood Ratio	8.445	3	.038
Linear-by-Linear Association	.282	1	.595
N of Valid Cases	<b>546</b>		

a. 2 cells (25.0%) have expected count less than 5. The minimum expected count is .33.

From the Chi-square test it may be deduced that there is no significant difference between respondents living in rural areas and urban areas since the data gathered indicates that the asymptotic significance, 0.011 and 0.038 (2-sided) is less than 0.05%. However, Chi-square test indicates that asymptotic significance on Linear-by-Linear Association is 0.595 that is greater than 0.05%. In this respect it may be

assumed that there is a significant difference between respondents from rural and urban areas.

Item 3 The vision and mission statements are the basis for operations in the school

		The vision and mission statements are the basis for operations in the school			
		U	A	SA	Total
Location	Rural Count	6	183	12	201
	% of total	1.1	33.0	2.2	36.3
	Urban Count	68	274	11	353
	% of total	12.3	49.5	2.0	63.8
Total	Count	74	457	23	554
	% of total	13.4	82.5	4.2	100

The majority of respondents in rural areas 195 [35.2%] and also in the urban areas 285 [51.43%] agree with the statement that the vision and mission statements are the basis for operations in the school. It would appear that the school without a vision is like a tree without roots. The data was verified through a Chi-square test.

#### Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	6.715 <sup>a</sup>	2	.035
Likelihood Ratio	7.293	2	.026
Linear-by-Linear Association	.108	1	.742
N of Valid Cases	554		

a. 0 cells (.0%) have expected count less than 5. The minimum expected count is 6.23.

From the Chi-square test it may be deduced that there is no significant difference between respondents living in rural areas and urban areas since the data gathered indicates that the asymptotic significance, 0.035 and 0.026 (2-sided) is less than 0.05%. The Linear-by-Linear Association indicates the asymptotic significance of 0.742 that is greater than 0.05%. It may be assumed that on the Linear-by-Linear Association there is significant difference in the respondents from rural and urban

areas regarding the statement that the vision and mission statements are the basis for operations in the school.

#### Item 4 Staff development should form part of school plans

		Staff development should form part of school plans					
		SD	D	U	A	SA	Total
Location	Rural Count			4	102	92	198
	% of total			0.7	18.5	16.7	35.9
	Urban Count	2	14	20	250	68	354
	% of total	0.4	2.5	3.6	45.3	12.3	64.1
Total	Count	2	14	24	352	160	552
	% of total	0.4	2.5	4.3	63.8	29.0	100

The majority of respondents in rural areas 194 [35.1%] and also in the urban areas 318 [57.6%] agree with the statement that staff development should form part of school plans. The data was verified through a Chi-square test.

#### Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	8.749 <sup>a</sup>	3	.033
Likelihood Ratio	8.302	3	.040
Linear-by-Linear Association	6.125	1	.013
N of Valid Cases	552		

a. 3 cells (37.5%) have expected count less than 5. The minimum expected count is .17.

From the Chi-square test it may be deduced that there is no significant difference between respondents living in rural areas and urban areas regarding the statement that staff development should form part of school plans since the data gathered indicates that the asymptotic significance, 0.033; 0.040 and 0.013 (2-sided) is less than 0.05%.

### Item 5 Standard setting is essential for improved teaching and learning

		Standard setting is essential for improved teaching and learning					
		SD	D	U	A	SA	Total
Location	Rural Count		4	18	115	64	201
	% of total		0.7	3.2	20.8	11.6	36.3
	Urban Count			84	160	109	353
	% of total			15.2	28.9	19.7	63.7
Total	Count		4	102	275	173	554
	% of total		0.7	18.4	49.6	31.2	100

The majority of respondents in rural areas 179 [32.3%] and also in the urban areas 269 [48.6%] agree with the statement that standard setting is essential for improved teaching and learning. The data was verified through a Chi-square test.

#### Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	11.224 <sup>a</sup>	3	.011
Likelihood Ratio	8.445	3	.038
Linear-by-Linear Association	.282	1	.595
N of Valid Cases	554		

a. 2 cells (25.0%) have expected count less than 5. The minimum expected count is .33.

From the Chi-square test it may be deduced that there is no significant difference between respondents living in rural areas and urban areas since the data gathered indicates that the asymptotic significance, 0.011 and 0.038 which is less than 0.05%. However, the Linear-by-Linear Association indicates that the asymptotic significance is 0.595 (2-sided) is more than 0.05%.

When one uses the Linear-by-Linear Association it may be assumed that there is a significant difference between respondents on the statement that standard setting is essential for improved teaching and learning.

### Item 6 School managers should give constant feedback to stakeholders

		School managers should give constant feedback to stakeholders					
		SD	D	U	A	SA	Total
Location	Rural Count			6	26	170	202
	% of total			1.1	4.8	31.1	37
	Urban Count			68	240	40	344
	% of total			12.5	44.0	7.1	63.0
Total	Count			74	266	210	546
	% of total			13.6	48.7	38.5	100

The majority of respondents in rural areas 196 [35.9%] and also in the urban areas 280 [51.3%] agree with the statement that school managers should give constant feedback to stakeholders. The data was verified through a Chi-square test.

#### Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	8.749 <sup>a</sup>	3	.033
Likelihood Ratio	8.302	3	.040
Linear-by-Linear Association	6.125	1	.013
N of Valid Cases	546		

a. 3 cells (37.5%) have expected count less than 5. The minimum expected count is .17.

From the Chi-square test it may be deduced that there is no significant difference between respondents living in rural areas and urban areas since the data gathered indicates that the asymptotic significance, 0.033; 0.040 and 0.013 (2-sided) is less than 0.05%. Using the preceding data it may be assumed that there is no significant difference among respondents on the statement that school managers should give constant feedback to stakeholders.

## Item 7 Educators need incentives for improved performance

		Educators need incentives for improved performance					
		SD	D	U	A	SA	Total
Location	Rural Count			12	150	38	200
	% of total			2.2	27.1	6.9	36.1
Urban Count		2	20	15	137	180	354
	% of total	0.4	3.6	2.7	24.7	32.5	63.9
Total	Count	2	20	27	287	218	554
	% of total	0.4	3.6	4.8	51.8	39.4	100

The majority of respondents in rural areas 188 [33.9%] and also in the urban areas 317[57.2%] agree with the statement that educators need incentives for improved performance. The data was verified through a Chi-square test.

## Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	6.715 <sup>a</sup>	2	.035
Likelihood Ratio	7.293	2	.026
Linear-by-Linear Association	.108	1	.742
N of Valid Cases	554		

a. 0 cells (.0%) have expected count less than 5. The minimum expected count is 6.23.

From the Chi-square test it may be deduced that there is no significant difference between respondents living in rural areas and urban areas since the data gathered indicates that the asymptotic significance, 0.035 and 0.026 which are less than 0.05%. On the other hand the Linear-by-Linear Association gives the asymptotic significance as 0.742 that is more than 0.05%. On the basis of the Linear-by-Linear Association it may be assumed that there is a significant difference in stakeholders regarding the statement that educators need incentives for improved performance.

### Item 8 Co-operative governance is essential for school development

		Co-operative governance is essential for school development					
		SD	D	U	A	SA	Total
Location	Rural Count			4	79	118	201
	% of total			0.7	14.3	21.3	36.4
	Urban Count	2	14	20	198	117	351
	% of total	0.4	2.5	3.6	35.9	21.2	63.6
Total	Count	2	14	24	277	235	552
	% of total	0.4	2.5	4.3	50.2	42.7	100

The majority of respondents in rural areas 197 [35.7%] and also in the urban areas 315[57.1%] agree with the statement that co-operative governance is essential for school development. The data was verified through a Chi-square test.

#### Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	8.749 <sup>a</sup>	3	.033
Likelihood Ratio	8.302	3	.040
Linear-by-Linear Association	6.125	1	.013
N of Valid Cases	552		

a. 3 cells (37.5%) have expected count less than 5. The minimum expected count is .17.

From the Chi-square test it may be deduced that there is no significant difference between respondents living in rural areas and urban areas since the data gathered indicates that the asymptotic significance, 0.033, 0.040 and 0.013 (2-sided) are less than 0.05%. It may be assumed that there is no difference among respondents regarding the statement that co-operative governance is essential for school development.

### Item 9 Functional structures are essential for school development

		Functional structures are essential for school development					
		SD	D	U	A	SA	Total
Location	Rural Count			12	168	21	201
	% of total			2.2	30.3	3.8	36.3
	Urban Count	2	10	24	102	215	353
	% of total	0.4	1.8	4.3	18.4	38.8	63.7
Total	Count	2	10	36	270	236	554
	% of total	0.4	1.8	6.5	48.7	42.6	100

The majority of respondents in rural areas 189 [34.1%] and also in the urban areas 317 [57.2%] agree with the statement that functional structures are essential for school development. The data was verified through a Chi-square test.

#### Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	8.749 <sup>a</sup>	3	.033
Likelihood Ratio	8.302	3	.040
Linear-by-Linear Association	6.125	1	.013
N of Valid Cases	<b>554</b>		

a. 3 cells (37.5%) have expected count less than 5. The minimum expected count is .17.

From the Chi-square test it may be deduced that there is no significant difference between respondents living in rural areas and urban areas since the data gathered indicates that the asymptotic significance, 0.033; 0.040 and 0.013 (2-sided) is less than 0.05%. It may be assumed that there is no significant difference among respondents regarding the statement that functional structures are essential for school development.

### 6.13 AGE AS A VARIABLE IN MANAGEMENT AND LEADERSHIP DEVELOPMENT MODELS

The researcher also used the t-test to further explain the data that were collected using the age of respondents. The t-test was used to show the standard deviation as well as the level of acceptance of the null hypothesis. The population was divided into samples using age as a criterion with young educators [regarded as being under 40 years:  $\leq 40$ ] and old educators [over 40 years:  $> 40$ ]. The following information [that should be well-depicted in Table 6.24] was used:

- The sample means for the independent samples;
- Each population's standard deviation
- The sample size for each sample
- A specified level of significance
- The appropriate z transformation formula

Numbers used in the following Table 6.24 were the same numbers as indicated under the age of respondents (cf. 6.2.1). The researcher identified crucial questions in the questionnaire and they were used to compare the response rate between the so-called:

- 168 young educators [ $\leq 40$ ]; and
- 388 old educators [ $> 40$ ].

In the analysis, sample 1 indicates Young educators [ $\leq 40$ ] while sample 2 Old educators [ $> 40$ ]. To interpret the data the researcher used the specified level of significance 0,05 or 5% with the z limit of  $-1.96$  and  $+1.96$  as it would become evident in the item analysis. In this case a decision rule is:

Accept  $H_0$  if  $z_{calc}$  falls between  $-1.96$  and  $+1.96$ .

Reject  $H_0$  if  $z_{calc}$  falls below  $-1.96$  or above  $+1.96$

Table 6.24: Comparison of responses based on age

	Age in years	n	Mean	Std	Std mean
Functional structures are essential for school development	<=40	168	4.47	0.650	0.071
	>40	388	4.23	0.715	0.051
Schools should have operational plans	<=40	168	4.27	0.543	0.060
	>40	388	4.13	0.406	0.029
Co-operative governance is essential for school development	<=40	168	3.92	0.684	0.075
	>40	388	4.10	0.602	0.043
Educators need incentives for improved performance	<=40	168	4.37	0.557	0.061
	>40	388	4.22	0.606	0.044
School managers should give constant feedback to stakeholders	<=40	168	4.33	0.546	0.060
	>40	388	4.16	0.651	0.047
Standard setting is essential for improved teaching and learning	<=40	168	4.35	0.876	0.096
	>40	388	4.09	1.017	0.073
Staff development should form part of the school's operational plans	<=40	168	4.47	0.650	0.071
	>40	388	4.23	0.715	0.051
The vision and mission statements are the basis for operations	<=40	168	4.27	0.543	0.060
	>40	388	4.13	0.406	0.029
A school manager should form and lead teams to produce tangible outcomes for school development	<=40	168	4.37	0.557	0.061
	>40	388	4.22	0.606	0.044
There should be well-tested programmes for management and leadership development in schools	<=40	168	4.35	0.876	0.096
	>40	388	4.09	1.017	0.073

## Item 1 Functional structures are essential for school development

From the preceding Table 6.24 the responses are categorised according to age 40 and above and below 40. The responses are as follows:

$$\begin{aligned}n_1 &= 168 \\x_1 &= 4.47 \\d_1 &= 0.650\end{aligned}$$

$$\begin{aligned}n_2 &= 388 \\x_2 &= 4.23 \\d_2 &= 0.715\end{aligned}$$

Required to find  $z_{calc}$

$$z_{calc} = \frac{4.47 - 4.27 - (0)}$$

$$\sqrt{\frac{0.650^2}{168} + \frac{0.715^2}{388}}$$

$$z_{calc} = \frac{0.24}{\sqrt{0.00383247}}$$

$$\begin{aligned}
 &= \frac{0.24}{0.06190694} \\
 &= 3.876786279 \\
 &= 3.88
 \end{aligned}$$

The  $H_0$  is rejected at the 5% significance level and the conclusion drawn is that there is a difference in means of the old and young respondents on the essence of functional structures for school development.

#### Item 2 Schools should have operational plans

From the preceding Table 6.24 the responses are categorised according to age 40 and above and below 40. The responses are as follows:

n1 = 168	n2 = 388
x1 = 4.27	x2 = 4.13
d1 = 0.543	d2 = 0.406

$$\begin{aligned}
 z_{\text{calc}} &= \frac{(4.27 - 4.13) - (0)}{\sqrt{\frac{0.543^2}{168} + \frac{0.406^2}{388}}} \\
 z_{\text{calc}} &= \frac{0.09}{\sqrt{0.002179888}} \\
 &= \frac{0.09}{0.04668927} \\
 &= 1.93
 \end{aligned}$$

The  $H_0$  is accepted at the 5% level of significance and it is concluded that there is no difference in mean scores of the old and young educators on the statement that schools should have operational plans.

### Item 3 Co-operative governance is essential for effective school development

From the preceding Table 6.24 the responses are categorised according to age 40 and above and below 40. The responses are as follows:

$$\begin{array}{ll} n_1 = 168 & n_2 = 388 \\ x_1 = 3.92 & x_2 = 4.10 \\ d_1 = 0.684 & d_2 = 0.602 \end{array}$$

$$z_{\text{calc}} = \frac{(3.92 - 4.10) - (0)}{\sqrt{\frac{0.682^2}{168} + \frac{0.602^2}{388}}}$$

$$\begin{aligned} z_{\text{calc}} &= \frac{-0.18}{\sqrt{0.003718887}} \\ &= -2.95 \end{aligned}$$

The  $H_0$  is rejected at the 5% significance level and the conclusion drawn is that there is a difference in means of the old and young respondents on the statement that co-operative governance is essential for effective school development.

### Item 4 Educators need incentives for improved performance

From the preceding Table 6.24 the responses are categorised according to age 40 and above and below 40. The responses are as follows:

$$\begin{array}{ll} n_1 = 168 & n_2 = 388 \\ x_1 = 4.37 & x_2 = 4.22 \\ d_1 = 0.557 & d_2 = 0.606 \end{array}$$

$$z_{\text{calc}} = \frac{(4.37 - 4.22) - (0)}{\sqrt{\frac{0.557^2}{168} + \frac{0.606^2}{388}}}$$

$$z_{\text{calc}} = \frac{0.15}{\sqrt{0.002793204}}$$

$$= 2.84$$

The  $H_0$  is rejected at the 5% significance level and the conclusion drawn is that there is a difference in means of the old and young respondents on the statement that educators need incentives for improved performance.

Item 5 School managers should give constant feedback to stakeholders

From the preceding Table 6.24 the responses are categorised according to age 40 and above and below 40. The responses are as follows:

$n_1 = 168$	$n_2 = 388$
$x_1 = 4.33$	$x_2 = 4.16$
$d_1 = 0.546$	$d_2 = 0.651$

$$z_{\text{calc}} = \frac{(4.33 - 4.16) - (0)}{\sqrt{\frac{0.546^2}{168} + \frac{0.651^2}{388}}}$$

$$z_{\text{calc}} = \frac{0.17}{\sqrt{0.00286677}}$$

$$= 3.18$$

The  $H_0$  is rejected at the 5% significance level and the conclusion drawn is that there is a difference in means of the old and young respondents on the statement that school managers should give constant feedback to stakeholders.

**Item 6** Standard setting is essential for improved teaching and learning

From the preceding Table 6.24 the responses are categorised according to age 40 and above and below 40. The responses are as follows:

$$\begin{array}{ll} n_1 = 168 & n_2 = 388 \\ x_1 = 4.35 & x_2 = 4.09 \\ d_1 = 0.876 & d_2 = 1.017 \end{array}$$

$$\begin{aligned} z_{\text{calc}} &= \frac{(4.35 - 4.09) - (0)}{\sqrt{\frac{0.876^2}{168} + \frac{1.017^2}{388}}} \\ z_{\text{calc}} &= \frac{0.26}{\sqrt{0.007233407}} \\ &= 3.06 \end{aligned}$$

The  $H_0$  is rejected at the 5% significance level and the conclusion drawn is that there is a difference in means of the old and young respondents on the statement that standard setting is essential for improved teaching and learning.

**Item 7** Staff development should form part of the school's operational plans

From the preceding Table 6.24 the responses are categorised according to age 40 and above and below 40. The responses are as follows:

$$\begin{array}{ll} n_1 = 168 & n_2 = 388 \\ x_1 = 4.47 & x_2 = 4.23 \\ d_1 = 0.650 & d_2 = 0.715 \end{array}$$

$$\begin{aligned} z_{\text{calc}} &= \frac{(4.47 - 4.23) - (0)}{\sqrt{\frac{0.650^2}{169} + \frac{0.715^2}{388}}} \\ z_{\text{calc}} &= \frac{0.24}{\sqrt{0.0038347}} \end{aligned}$$

$$= 3.88$$

The  $H_0$  is rejected at the 5% significance level and the conclusion drawn is that there is a difference in means of the old and young respondents on the statement that staff development should form part of the school's operational plans.

**Item 8**      The vision and mission statements are the basis for operations in the school

From the preceding Table 6.24 the responses are categorised according to age 40 and above and below 40. The responses are as follows:

$$\begin{array}{ll} n_1 = 168 & n_2 = 388 \\ x_1 = 4.27 & x_2 = 4.13 \\ d_1 = 0.543 & d_2 = 0.406 \end{array}$$

$$\begin{aligned} z_{\text{calc}} &= \frac{(4.27 - 4.13) - (0)}{\sqrt{\frac{0.543^2}{168} + \frac{0.406^2}{388}}} \\ z_{\text{calc}} &= \frac{0.09}{\sqrt{0.002179888}} \\ &= \frac{0.09}{0.04668927} \\ &= 1.93 \end{aligned}$$

The  $H_0$  is accepted at the 5% level of significance and it is concluded that there is no difference in mean scores of the old and young educators on the statement that schools should have operational plans.

**Item 9**      A school manager should form and lead teams to produce tangible outcomes for school development

From the preceding Table 6.24 the responses are categorised according to age 40 and above and below 40. The responses are as follows:

$$\begin{aligned}n_1 &= 168 \\x_1 &= 4.37 \\d_1 &= 0.557\end{aligned}$$

$$\begin{aligned}n_2 &= 388 \\x_2 &= 4.22 \\d_2 &= 0.606\end{aligned}$$

$$z_{\text{calc}} = \frac{(4.37 - 4.22) - (0)}{\sqrt{\frac{0.557^2}{168} + \frac{0.606^2}{388}}}$$

$$\begin{aligned}z_{\text{calc}} &= \frac{0.15}{\sqrt{0.002793204}} \\&= 2.84\end{aligned}$$

The  $H_0$  is rejected at the 5% significance level and the conclusion drawn is that there is a difference in means of the old and young respondents on the statement that a school manager should form and lead teams to produce tangible outcomes for school development

Item 10 There should be well-tested programmes for management and leadership development in schools

From Table 6.24 the responses are categorised according to age 40 and above and below 40. The responses are as follows:

$$\begin{aligned}n_1 &= 168 \\x_1 &= 4.35 \\d_1 &= 0.876\end{aligned}$$

$$\begin{aligned}n_2 &= 388 \\x_2 &= 4.09 \\d_2 &= 1.017\end{aligned}$$

$$z_{\text{calc}} = \frac{(4.35 - 4.09) - (0)}{\sqrt{\frac{0.876^2}{168} + \frac{1.017^2}{388}}}$$

$$\begin{aligned}z_{\text{calc}} &= \frac{0.26}{\sqrt{0.007233407}} \\&= 3.06\end{aligned}$$

The  $H_0$  is rejected at the 5% significance level and the conclusion drawn is that there is a difference in means of the old and young respondents on the statement that there should be well-tested programmes for management and leadership development in schools.

The following discussion focuses on interpretation of responses an independent sample test.

#### 6.14 AN INDEPENDENT SAMPLE TEST OF RESPONSE RATE

According to Jaccard & Becker (1990:232), the stronger the influence on the dependent variable, the larger the sum of squares explained should be relative to the sum of squares total. For this reason, as the eta-squared approaches 1.00 the relationship between variables is stronger, and as eta-squared approaches 0, the relationship between the variables is weaker (Jaccard & Becker 1990). The following Table 6.25 indicates the responses of an independent sample test on responses according to age such as:

- functional structures are essential for school development [0.896];
- co-operative governance is essential for effective school development [0.781];
- school managers should give constant feedback to stakeholders [0.059];
- staff development should form part of the school's operational plans [0.509];
- the vision and mission statements are the basis for operations in the school [0.896]; and
- there should be well-tested programmes for management development [0.781].

Table 6.25: Independent Sample Test

	Levine's Test for Equality of variances		t-test for equality of means							
	F	Sig.	t	df	Sig (2-sided)	Mean dif	Std error dif	95% confidence interval of the difference lower upper		
Functional structures are essential for school development	0.017	0.896	2.606 2.707	275 169.412	0.010 0.007	0.24 0.24	0.091 0.88	0.418 0.411	0.058 0.064	
Schools should have operational plans	24.036	0.000	2.302 2.053	275 122.899	0.022 0.042	0.14 0.14	0.059 0.066	0.253 0.267	0.020 0.005	
Co-operative governance is essential for effective school development	0.077	0.781	2.223 2.113	273 139.251	0.027 0.036	0.18 0.18	0.082 0.087	0.021 0.012	0.346 0.355	
Educators need incentives for improved performance	1.006	0.317	2.022 2.093	275 167.892	0.044 0.038	0.16 0.16	0.078 0.075	0.310 0.305	0.004 0.009	
School managers should give constant feedback to stakeholders	0.437	0.509	2.122 2.278	273 180.703	0.035 0.024	0.17 0.17	0.082 0.076	0.335 0.324	0.013 0.023	
Standard setting is essential for improved teaching and learning	0.879	0.349	2.043 2.169	275 178.636	0.042 0.031	0.26 0.26	0.128 0.121	0.514 0.500	0.010 0.024	
Staff development should form part of the school's operational plans	0.437	0.509	2.122 2.278	273 180.703	0.035 0.024	0.17 0.17	0.082 0.076	0.335 0.324	0.013 0.023	
The vision and mission statements are the basis for operations in the school	0.017	0.896	2.606 2.707	275 169.412	0.010 0.007	0.24 0.24	0.091 0.88	0.418 0.411	0.058 0.064	
A school manager should form and lead teams	24.036	0.000	2.302 2.053	275 122.899	0.022 0.042	0.14 0.14	0.059 0.066	0.253 0.267	0.020 0.005	
There should be well-tested programmes for management development	0.077	0.781	2.223 2.113	273 139.251	0.027 0.036	0.18 0.18	0.082 0.087	0.021 0.012	0.346 0.355	

The abovementioned inferences were drawn using the Levine's test for Equality of Variance it is observed that only two variables generated a value 0.000 indicating that the relationship between the variables is weaker. Similarly, most of the responses have the eta-squared approaching 1.00 indicating that the relationships between variables are stronger. On the other hand, it is also observed that according to the t-test for Equality of Means there is no significant difference in all variables since their values are less than 0.05.

Having presented an interpretation on an independent sample test focus will now be on interpretation of responses to the checklist.

#### 6.15 INTERPRETATION OF RESPONSES TO THE CHECKLIST

Checklists were used to gather data on important documents in schools such as the vision and mission statements, policies, structures, and school development plans. The aim of the researcher in using the checklists was to investigate the degree to which operations in schools were linked to schools' operational plans. Fifty [50] school managers participated in the filling up of a checklist and their responses are depicted in Table 6.26.

Table 6.26: Responses to questions in the checklist

	Yes	No
1. The school has a vision and mission statement	50 100%	- 0
2. Stakeholders participated in drawing up the vision of the school	45 90%	5 10%
3. The school has a set of priorities	35 70%	15 30%
4. Each priority has been turned into a set of targets	10 20%	40 80%
5. There is a team leader for every target	15 30%	35 70%
6. There is a specific task for every educator	42 84%	8 16%
7. There are clear success criteria, both quantitative and qualitative, for each target	5 10%	45 90%
8. Expectations and timeframes are clear and understandable	5 10%	45 90%
9. It is clear to all involved that reports on the success of action plans should be presented to you.	50 100%	- 0%
10. You use an appropriate appraisal system to give feedback to teams for their work	20 40%	30 60%

Checklists assisted the researcher to meet primary school managers on a one-to-one basis, and from the preceding Table 6.26 on questions asked in the checklist it may be construed that:

- All 50 [100%] school managers work in schools that had vision and mission statements;
- Stakeholders participated in the drawing up of the visions of schools as indicated by the majority of school managers, 45 [90%];
- Schools had sets of priorities as indicated by the majority of respondents, 35 [70%];
- Priorities had not been turned into targets as indicated by 40 [80%] respondents;
- There are no team leaders for target groups as indicated by 35 [70%] respondents;
- There are specific tasks for individual educators in schools as indicated by 42 [84%] school managers;
- There are no specific criteria for targets as indicated by 45 [90%] of respondents;
- Expectations and timeframes are not clear and understandable as indicated by 45 [90%] respondents;
- It is clear to all involved that reports on the success of action plans should be presented to school managers as indicated by all 50 [100%] respondents; and
- An appropriate appraisal system is not used to give feedback to teams for their work as indicated by 30 [60%] respondents.

From the preceding discussion it is evident that most school managers may not had the knowledge or skills to:

- Turn priorities into targets;
- Select team leaders for target groups
- Set up specific criteria for targets;
- Clarify expectations and set up realistic timeframes for task completion; and
- Develop an appropriate appraisal system for providing feedback to teams.

The data collected in the checklist was compared with the data found in the interviews.

#### 6.16 RESPONSES TO INTERVIEWS

A total of fifty [50] primary school managers in Bojanala East and Bojanala Regions were interviewed. Questions for the interview ranged from personal experiences and qualifications to include more challenging questions related to school management practice at school level (cf. appendix 4). Here follows an analysis of responses to the questions.

**Item 1** Did you have a management qualification by the time you were appointed to the management position you are occupying at your school?

16% of respondents indicated that they had a management and or leadership qualification when they were appointed to the management position they were occupying at their schools. The majority of respondents, 38 [76%], did not have a management or leadership qualification when they were appointed to management positions while 4 [8%] are studying towards a qualification in management and leadership. From the preceding analysis it can be construed that most of the school managers in Bojanala West and Bojanala East primary schools are appointed to their positions before they had acquired a school management or leadership qualification.

**Item 2** What do you do to enhance staff morale and motivation in your school?

The overwhelming majority of respondents, 44 [88%], indicated that they talk to educators and encouraged them to work hard. 6 [12%] respondents indicated that they organise motivational speakers to address the educators. From the responses of school managers it can be inferred that the most

common method for encouraging educators to be productive is of talking to them and encouraging them to work hard..

**Item 3** Are there functional structures in your school?

The overwhelming majority of respondents, 43 [86%], indicated that there are functional structures in their schools. 7 [14%] respondents indicated that there are structures in their school, but none of the structures had reported its success rates. From the data collected it can be concluded that the majority of schools had functional structures. However, there are indications that in most cases structures do not keep record of their successes.

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**Item 4** What do you do to empower structures in your school to function effectively?

The overwhelming majority of respondents, 42 [84%], indicated that they form the structures and allow these structures to function without interference. 8[16%] respondents indicated that they hold meetings and provide informal training to members in these structures. However, all 50 [100%] respondents agreed that the structures do not have decision-making power, they can, however, recommend what should be done in the school. From the data collected it can be inferred that structures that are created in schools are allowed to operate independently. However, it is only in a few schools that structures are capacitated to function effectively. In addition, structures do not have decision-making powers, but they can make some recommendations.

**Item 5** What should be done to assist you to make structures in your school to function effectively?

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The majority of respondents, 30 [60%], indicated that they needed to be trained on how to assist structures to function effectively. 20 [40%] respondents intimated that personnel serving in the structures need incentives to be more committed to their work. From the preceding data analysis it would appear that the majority of school managers need to be capacitated to ensure that structures become effective in carrying out their duties and functions. There are also indications that personnel serving in the structures need incentives to work hard.

**Item 6** Which strategies do you use for consulting stakeholders when changes are implemented in the school?

The overwhelming majority of respondents, 40 [80%], indicated that stakeholders' meetings are the only strategy they use for consulting stakeholders when changes are instituted in the school. 10 [20%] respondents indicated that they use workshops for assisting stakeholders when changes are implemented in the school. From the data analysis it can be construed that stakeholders' meetings are the only strategy used for consulting stakeholders when changes are instituted in the school. Some school managers use workshops to assist stakeholders to understand changes implemented in the school.

**Item 7:** Do you think that there is any need for you to change your approach for implementing changes in your school? Give reasons for your response.

The majority of respondents, 36 [72%], indicated that there is a need for them to change their approach for implementing changes in their schools. Their responses are based on the fact that they always meet with resistance whenever they wanted to implement changes in their schools. 14 [28%] respondents did not want to change the way they are implementing changes in their schools since they did not have problems in their schools. From the



of diverse needs and interests of stakeholders 5.6 with average of 3.97 and standard deviation of 0.14 (cf. 6.4).

- Operational strategies are essential in schools. However, Table 6.13 indicates that the highest ranked item is that management views educators as self-motivated and creative people with its mean = 4.54 and standard deviation = 0.45. The lowest ranked items are forging of trust, respect and understanding and lack of understanding of the school's vision and mission by stakeholders with their means = 3.99 and standard deviations = 0.15 (cf. 6.9);
- Business discipline is essential if schools are to be effective in carrying out their mandate of socialisation and equipping learners for an active and meaningful life in society. in the same vein, Table 6.16 indicates that item exposure of educators to a developmental appraisal system is the highest ranked with the mean = 4.65 and the standard deviation = 0.56. The lowest ranked items are the use of MIS, lack of systems for quality assurance and a lack high expectations about learners' performance with the mean = 3.99 and standard deviation = 0.15 (cf. 6.7);
- Pay and incentives are necessary for increasing educators' motivation and staff retention rates in schools; However, in the empirical study The item ranked highest is that educators perform below expected standards because they are not well-paid with its mean = 4,52 and standard deviation = 0.48. The lowest ranked item is that management does not ensure that teaching is intrinsically meaningful to educators and learners with its mean = 3.96 and standard deviation = 0.14 (cf. 6.6);
- Change management is essential not only for the mental health of educators, but also for maintaining stability in schools. Table 6.11 indicates a high mean score for item that states that management takes capacity building seriously, and affords the staff opportunities for

professional development at 4.51 and standard deviation at 0.57. However, management is weak when coming to the issue of change management, and management does not provide intervention strategies to assist educators cope with changes in the school as indicated by the lowest score with the mean at 3.96 and standard deviation at 0.15 (cf 6.8).

- Functional structures are essential for effectiveness in schools. The items ranked highest are about statements that structures have constitutions and operational plans with a mean of 4.49 and a standard deviation of 0.56. However, reporting is the lowest ranked item with the mean of 3.97 and the standard deviation of 0.13 (cf. 6.5).

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Furthermore, data analysis yielded significant data on how male and female respondents view the principles of the Beehive Model and their relevance to management and leadership development in schools. For instance, there are differences between male respondents on the essence of communication in schools and the essence of stakeholder participation in school-related matters. However, to a large degree there are indications that most of the respondents understood the essence of the Beehive Model for a model in management and leadership development in primary schools. The following discussion would focus on a management and leadership model based on the Beehive Model.

## CHAPTER 7

### A BEEHIVE MODEL FOR MANAGEMENT AND LEADERSHIP DEVELOPMENT IN PRIMARY SCHOOLS

#### 7.1 INTRODUCTION

According to Fitzgerald, McLennan and Munslow (1997:4), sustainable development requires a massive educational effort so that citizens are made aware of the need to manage resources wisely to achieve maximum benefit at a minimum cost. In the same vein, educational practice requires vigorous and sustained investment to enhance management and leadership development (Steyn 2002). In the light of the quest for sustainability it is also imperative that programmes be developed to address the narrow orientation to education transformation and reform. In addition, new programmes should be developed to contribute new insights to the growing global movement of holistic, system-conscious education change and social renewal (Mathibe 1998).

Educational practice is not static but it keeps up with changes and needs of a society. In this context, Rautenbach (1992:371) concludes that educational institutions need to attend to and address staff training and re-training to ensure that they understand the contexts in that the learners would be living and working. Evidently, the content of educational institutions – whether material or non-material – should maintain their effectiveness and accountability to all the stakeholders. In the light of the preceding discussion the researcher notes that educational management and leadership programmes may assist to ensure the effectiveness and sustainability of education systems. It is noted that quality and sustainable education programmes are enhanced by the quality of management and leadership that is provided. For this reason, Tribus (1993:12) notes that the job of the school manager is to work on the system to improve it continuously.

with the assistance of educators, while the job of the educators are to work on the system to improve it continuously with the assistance of the learners. In the preceding chapter the data analysis revealed that there are gaps in school management and leadership, and the Beehive Model is therefore presented to enhance capacity building in schools for effective development of management and leadership acumen in primary schools. The Model is depicted in Figure 7.1.

**Figure 7.1: The Beehive Model for Management and Leadership Development**

Model Outcomes Goals	<ul style="list-style-type: none"> <li>to establish and maintain a positive and open learning environment</li> <li>to forge of partnerships and networks by ensuring mutual trust and respect</li> <li>to monitor progress of structures in schools</li> <li>to maintain business discipline</li> <li>to recruiting talent and maintaining it in the school</li> <li>to develop operational strategies in schools</li> <li>to manage change in schools.</li> </ul>
Competency 1: Engaging stakeholders	<ul style="list-style-type: none"> <li>ensuring positive human relations, organisational development, and leadership skills</li> <li>acquiring skills in participative management and variations in staffing</li> </ul>
Competency 2 Business Discipline	<ul style="list-style-type: none"> <li>acquiring skills in developing school and community relations, coalition building, and related public service activities</li> <li>developing strategies to negotiating, lobbying, collective bargaining, policy development, and policy implementation</li> </ul>
Competency3 Organisational Strategy	<ul style="list-style-type: none"> <li>planning future methods to anticipate occupational trends reliable performance indicators for instructional outcomes</li> </ul>
Competency 4 Change Leadership	<ul style="list-style-type: none"> <li>using instructional and motivational psychology</li> <li>managing change to enhance mastery of educational goals</li> </ul>
Competency 5 Talent Creation	<ul style="list-style-type: none"> <li>assessing system and staff needs in order to identify areas for staff development and allocation of resources</li> </ul>
Competency 6 Pay & Incentives	<ul style="list-style-type: none"> <li>facilitating planning, management and operations</li> <li>knowledge of legal concepts, regulations, and codes for school operation</li> </ul>
Competency 7 Functional Structures	<ul style="list-style-type: none"> <li>gathering, analysing and interpretation of data in the school</li> </ul>

The following discussion focuses on the operation of the Beehive Model for management and leadership development.

## 7.2 ENGAGING STAKEHOLDERS IN SCHOOL ACTIVITIES

Stakeholder participation is essential in schools and consequently it should be enhanced (Crow 1993:133; Dimmock 1995:172). Organisations, big and small, depend on external feedback loops to understand whether they are operating according to the mandates of their stakeholders (cf.3.3). According to Steyn (1998), organisations that are responsive to consumer needs are more competitive than those organisations that operate in isolation and that do not keep their operations in response to stakeholders' needs. This may be a lesson for the schooling system since parents and learners [as consumers and clients] need to play a significant part in dictating what schools should offer if they are to become viable business entities (cf. 3.4).

Bezzina (1993) is also of the view that school managers should ensure active stakeholder participation in the daily lives of schools. Stakeholder participation may be enhanced through participative and collaborative management in schools (Dimmock 1995:176). It is envisaged that the study Model would ensure that school managers are trained to demonstrate:

- 
- The ability to lead by examples and be programmes of the values and vision of schools (cf. 4.3);
  - Commitment to cooperative governance in schools (cf 4.4);
  - Commitment to ensure involvement of parents and the community in the running of the school (cf. 3.3.1);
  - The ability to develop and maintain sound working relationships with the SGB, parents, learners, the community and other interest groups in education (cf. 4.3.1); and

- Creativity and the ability to foster an environment of collective bargaining, collaboration and negotiation in schools (cf. 3.3.2).

### 7.2.1 Outcomes of engaging stakeholders in school activities

It is noted that to ensure active stakeholder participation any programmes that may retract from the Model for management and leadership development should lead to the accomplishment of the following critical cross-field outcomes that have been cited by Department of Education (1997):

- Working well with others as a member of a team, group, organisation, community [SO3];
- Collecting, analysing, organising and critically evaluating information [SO2,3]; and
- Demonstrating an understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation [SO1].

When one looks at the preceding critical cross-field outcomes it is apparent that school managers should not be only committed to working with stakeholders in a team, they should actually ensure that stakeholders are consulted whenever new plans are developed and implemented in their schools (cf. 3.3.2). According to Dinham et al. (1995), schools cannot do without the contribution of stakeholders and thus, it is essential that team-work and team-spirit be enhanced and nurtured in schools. School-managers need skills to collect, analyse, organise and evaluate data from different stakeholders and not to pay attention to some stakeholders but discount the contributions of others.

The Model per se should ensure that school managers understand that no person is an island and therefore, it is necessary to listen to the different views of stakeholders to have a better understanding of challenges and issues facing the

school (cf, 3.2). In this case, the Model recommends the following specific outcomes, as listed by the Department of Education (1997):

- Specific Outcome 1: To be committed to democratic leadership and effective teamwork;
- Specific Outcome 2: To develop and communicate school values, vision, mission, policies and plans in a collaborative way and seek commitment to these; and
- Specific Outcome 3: To develop and maintain sound working relationships with SGBs as well as parents, learners, the community and other agencies.

### 7.2.2 Cooperation in school governance

Participative and collaborative management approaches typify practices in all democracy-orientated systems (cf. 3.3.1). Ostensibly, school manager should understand that collaboration is sought and not secured under duress. Participation and collaboration cultivate cooperation and collective responsibility in educational management. For this reason, Anderson and Maharasoa (2002:18) regard stakeholders as partners in education and consequently, their involvement in school governance is necessary in order to ensure:

- engagement in collaborative planning processes;
- improvement of administrative systems;
- arrival at a common vision for their partnership; and
- employment of strategies for quality assurance and monitoring.

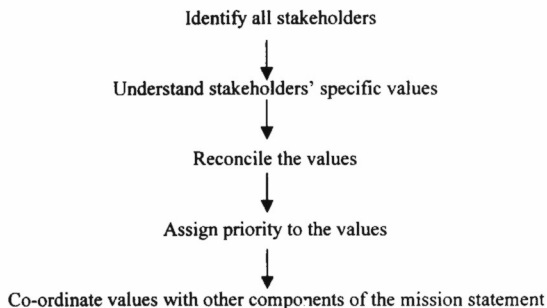
From the preceding statement it would appear that partnerships dissolve barriers that enhance access to, and mobility of ideas in provision of quality education in present-day systems. Subsequently, Anderson and Maharasoa (2002:18) note that partnerships result in cross-fertilisation of ideas with regard to values and principles of good educational practices. It is thus necessary that school managers

be exposed to the Beehive Model in order to acquire skills and knowledge that would capacitate them to:

- Create a commitment to a common purpose among stakeholders;
- Improve communication and reduces misunderstandings;
- Foster creativity in finding solutions;
- Enhance motivation;
- Prevent individuals from being isolated;
- Generate a sense of collective achievement; and
- Support teamwork.

The Model presupposes that team members should have a common understanding of what needs to be done, the time-scales involved and who is to do what. In a school situation, just as it is in any organisation, members need to expect that there would be mutual respect among team members (cf 2.2.1). The preceding discussion suggests that enhancing stakeholder participation is a *sine qua non* for effective school management and leadership (cf. 3.2.1). However, the diversity of interests amongst stakeholders may undermine school development if they are not effectively managed. In this respect, school managers need to be trained to bargain with different stakeholders in order to forge a common vision and shared values for the school's development. Figure 7.1 depicts the major elements for consideration in management and leadership development that are essential for reconciling conflicting values of stakeholders.

Figure 7.2: Reconciling conflicting values of stakeholders



Just as Figure 7.2 presents a step-by-step approach to reconciling stakeholders' conflicting values, it also fosters a common vision and mission for the school. It is an undisputed fact that when a school manager knows the school's stakeholders it becomes easier to consult and understand their expectations from the school (cf. 2.5). Notably, the values and expectations of stakeholders may differ, and this makes it imperative that the school managers be competent in bargaining, negotiating and leading discussions in order to arrive at accommodating decisions. This should become lucid in the following assessment criteria.

### 7.2.3 Assessment criteria

The Model recommends an intentional activity-based approach to management and leadership development which has measurable outcomes and specific competencies. As a result, it is expected that exposure to the Model should enable school managers to:

- Treat people fairly, equitably, and with dignity and respect;
- Maintain a positive school climate; and

- Challenge, influence and motivate stakeholders to work cooperatively to achieve the vision of the school.

In order to assess the school manager's ability to perform the above-listed tasks requires that assessment criteria be linked to performance of tasks aimed at enhancing stakeholder participation. The following assessment criteria are thus proposed for this important principle:

- Portfolio: this should provide data indicating responsibility- and job-allocation schedules, memoranda and letters used for communication with stakeholders;
- Records of meetings held with stakeholders; and
- Records of team building exercises.

Preceding assessment criteria should form the starting point for intervention programmes that may be developed for enhancing management and leadership development in schools. The discussion would now focus on developing business discipline in schools.

### 7.3 BUSINESS DISCIPLINE IN SCHOOLS

Business discipline is essential if schools are to be effective in carrying out their mandate of socialisation and equipping learners for an active and meaningful life in society. The Model should assist school managers to change their views about schools from being centres of information consumption to becoming centres of excellence and burgeoning competitiveness. The rationale for this line of thought is that in the context of 'the shrinking globe' – as typified by globalisation and information explosion schools – should be at the cutting edge of developments (cf. 3.3).

There is a need for schools to position themselves strategically if they have to continue attracting learners. In the present-day free-market economy to be on the cutting edge needs a school to be competitive in the market and to be responsive to the needs of the clients and community at large (cf.3.3). Ostensibly, should be competitive and self-sustaining institutions or else they would lose learners, and educators would be declared to be ‘in addition’ and thus be redeployed to areas they are scarce.

Surely, in the light of the preceding discussion school managers need to be trained to think strategically and to implement school’s operational plans effectively. It goes without saying that the development of business discipline in schools requires that school managers be assisted to fulfil the following responsibilities in line with the tenets of the Beehive Model by having:

- 
- To develop a systematic yet flexible approach to running schools (cf. 4.4);
  - Provide explicit links between school goals and actions (cf. 4.6);
  - Give unambiguous guides for action, ensuring consistency between educators in operating the school policy (cf. 4.3);
  - Help the school to explain to its partners what it does and why (3.3.1); and
  - Support realistic school development plans (cf. 3.5).

From the preceding discussion it can be construed that in the present-day schooling is serious business, and effective school management and leadership are the sine qua non for viable and productive schooling.

### 7.3.1 Outcomes for building business discipline in schools

In line with the seven critical outcomes outlined by the Skills and Qualifications Authority (SQA), a model for managers and leadership should have essential critical outcomes. As a result, the following illustrative cross-reference from the regulated critical cross-field outcomes to the specific outcomes [SO1, SO2, SO3 and SO4] is outlined for the Model:

- Organising and managing oneself and one's activities responsibly and effectively (particularly SO1);
- Reflecting on and exploring a variety of strategies to learn and work more effectively (SO2) and
- Demonstrating an understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation (SO3, SO4) (Department of Education 1997).

Preceding critical cross-field outcomes are essential for management and leadership development since it is obvious that a person who can't merely organise or manage herself or himself would had difficulty in managing or organising a school. In addition, the model emphasises that school managers engage in problem-solving. Furthermore, familiarity with principles linked to business discipline should enable school managers to:

- Specific Outcome 1: Demonstrate a passionate interest in teaching and learning and an ability to foster this in both staff and learners;
- Specific Outcome 2: Understand and be able to apply relevant content knowledge reflectively in the design, implementation and evaluation of teaching and learning and the organisation of the school environment;
- Specific Outcome 3: Demonstrate the ability to take a systems view of a flexible approach to running schools, and

Preceding specific outcomes are essential for ensuring that schools perform their functions appropriately. In the context of the Model, performance management is important in schools, and the following discussion will further elaborate on this view.

### 7.3.2 The school performance management model

A lot has been written about what an effective school is, and a lot of criticisms had been levelled at the concept of effective schools. However, one cannot overlook the fact that some schools are better organised and managed than others. For this reason, Table 7.1 indicates what is regarded as a school performance model.

Table 7.1 The performance management Model

Launching the process	Coaching	Evaluation
Alignment with the business strategy	Interim checking of progress	Measuring performance
Alignment with departmental goals	Exploring caused of poor performance	Determining amount of value added
Determining employee goals	Counselling or mentoring	Allocating results of evaluation to HR systems
Defining parameters of an action plan		Reviewing new business strategy and departmental and employee goals

Adapted from Schultz (2002:518)

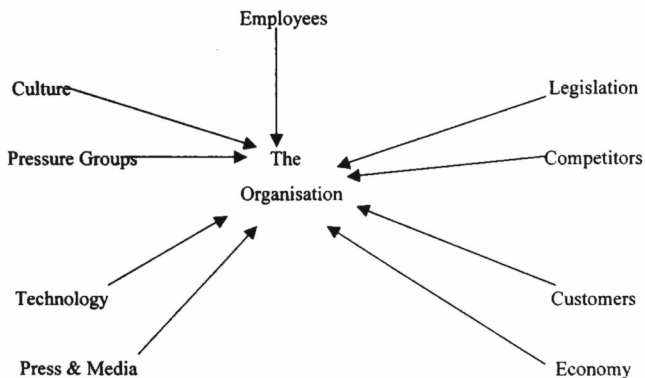
The following discussion unpacks the components of the performance model.

#### 7.3.2.1 Launching the process

From the preceding Table 7.1 it can be deduced that performance in schools may be enhanced through launching the process. Processes do not occur in a vacuum,

they occur at a particular time, in a particular space, and in a particular manner. Nevertheless, processes have universal characteristics such as vision and mission. Launching a process requires a critical assessment of the school's vision and mission statements in order to provide indicators for what is to be done, by whom and by when (cf. 3.4). Figure 7.3 provides an environmental map for launching the school's model of action.

Figure 7.3: The environmental map



From the preceding Figure 7.3 it can be construed that the school, as a school is facing a plethora of challenges from the staff/employees, legislation, competitors, customers/clients, the economy of the country, the press and media, technological developments, pressure groups [employee and learners' formations and culture]. One way of addressing these challenges is through coaching.

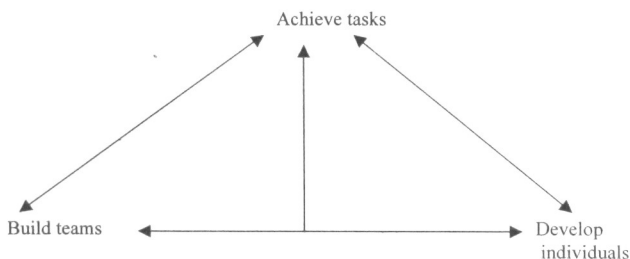
### 7.3.2.2 Coaching

The leadership role of those in charge of implementing the action plans is crucial in coaching. Educators and participants in the school's operational plan need to be guided to achieve the vision and mission of the school. In the light of the preceding assertion, typical of coaching the school manager needs skills in order to:

- Create a vision;
- Provide inspiration;
- Grow people;
- Thrive on change
- Be a learner; and
- Thrive on collaboration.

It would appear that a coach does not only expect results from the team, he/she provides inspiration for the team to succeed. Figure 7.3 captures the essence of coaching in the school situation.

Figure 7.4: The essence of coaching in schools



From Figure 7.4 it is evident that staff coaching is aimed at achieving tasks in the school. However, attainment of the goals set in the different tasks requires teamwork and individual skills. Exposure to the management and leadership model would thus capacitate school managers to be effective coaches in team-building and individual development.

### 7.3.2.3 Evaluation

One may never claim to have succeeded in task performance until one has conducted an evaluation. In the same vein, progress and development in schools should be measurable, and performance indicators should be linked to action plans in order to monitor the success rate of the school in achieving its vision and mission statements. Figure 7.5 provides the synopsis for an evaluation plan in a school.

Figure 7.5: An Evaluation Plan

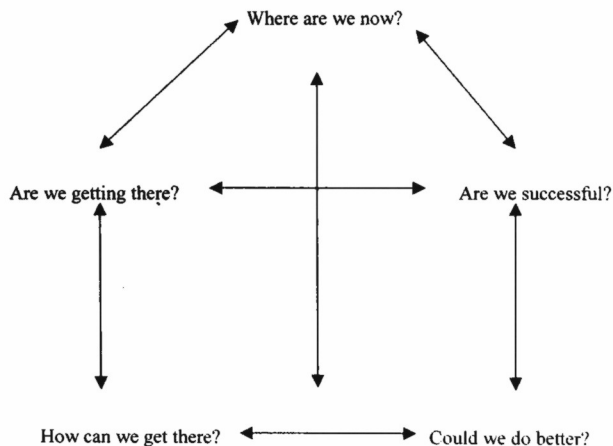


Figure 7.5 indicates that a school manager can state with confidence that there is development in the school only if evaluation has been effected. However, one needs to be aware that leadership may be said to be effective only when there is harmony and rapport between the task, team, and individual (cf 2.2.1.5). It would appear that managers who uphold Theory X principles (cf. 2.2.1.3) verbatim may have results but at the same time also an alienated labour force. The Model should assist school managers to evaluate their management and leadership practices and to acquire knowledge and attitudes for embracing a transformative leadership approaches (cf 2.2.1.8). It would appear that the competencies of school managers in forging and enhancing business discipline in schools should be evaluated using the assessment criteria proposed in the following discussion.

### 7.3.3 Assessment criteria on enhancing business discipline in schools

In line with the principles of the Model the school manager should be able to produce the following tangible outcomes:

- Developing policies, plans and targets in ways that establish shared vision and direction for the school;
- Providing guidance on the design of learning programmes and standards for learner assessment and practices; and
- Setting standards and expectations for performance.

It is envisaged that management and leadership models that retract from the Model would provide school managers with practical skills that go with the aforementioned outcomes. That said, one would expect portfolios, and policy studies developed by school managers. Furthermore, the Model should assist school managers to develop appropriate measures for enhancing business discipline in schools by having a business information list for communicating with stakeholders. The business information list assists the school to take stock of its

resources, and the data collected may be used for talent creation in the school. The following discussion focuses on talent creation in schools.

#### 7.4 ENSURING TALENT CREATION IN SCHOOLS

Talent creation, through training and development of the workforce, is one of the essentials in present-day organisations. According to Nel (2002:497), training and development lead to improved profitability and more positive attitudes toward profit orientation. For example, on-the-job training methods usually fit the needs of a particular employee since they consider background, knowledge and skills (Nel 2002:489). The following outcomes are recommended for the Model.

The Model envisages that school managers would be enabled to achieve the following critical cross-field outcomes:

- 
- Contributing to the full development of each educator and learner by reflecting on and exploring a variety of strategies to learn more effectively [SO1.3];
  - Working well with others as a member of a team, group, organisation, community [SO2.4];
  - Collecting, analysing, organising and critically evaluating information [SO2]; and
  - Organising and managing oneself and one's activities responsibly and effectively [SO1] (Department of Education 1997).
- 

The above-mentioned critical cross-field outcomes are linked to specific outcomes of a management and leadership model for primary schools. Exposing school managers to a model aimed at enhancing talent and utilising it should enable them to achieve the following specific outcomes:

- 
- Specific Outcome 1: Plan, allocate, support and evaluate work undertaken by individuals, groups, and teams;
-

- **Specific Outcome 3:** Develop responsibility and autonomy.
- **Specific Outcome 4:** Develop the capability to work in teams, groups and teams to enhance performance in the classroom.

#### 7.4.1 A practical approach to talent education in schools

According to Du Bois (1983), on-site job methods are a time-tested and popular since they allow workers to learn by actually performing the job. The following points are highlights of on-site methods for the purpose of utilization in the school situation, particularly in learning objectives, manageable steps, a strong system of quality control, the selection of capable talent appropriately and a number of steps in the total system designed to repair and take correction of a worker's performance by building on the strengths of the worker. The following table presents a number of preparatory activities that can be used to facilitate the implementation of on-site, Table 7.2 presents a list of the following activities (Bull, Lambert (2006) for the reference).

Table 7.2 Four stages of on-site method for learning

Stage	Characteristics
Orientation	Learners are exposed to the new environment, the task to be learned is related to the primary job, the use of the on-site method is explained.
Guiding	The initial and on-site method is supported by the use of scaffolding as the learner is not an expert in the task to be learned and is not prepared.
Learning	The learner follows the internalized skills and knowledge that he or she acquires, he or she is able to perform the primary task successfully.
Practice	With support diminished, the learner is able to perform the task independently.

From the preceding table 7.2 it would appear that the on-site method of education can be explained and analyzed in terms of the following steps:

(2001:10-11) are of the view that talent creation should be based on a talent mindset and development through training. This then necessitates that talent creation be regarded as a cornerstone of productivity and competitiveness in the school. Notably, talent creation in a school should involve the following:

- Analysing the school's person-power and human resources needs;
- Expansion of skills; and
- Finalising the process of talent creation and skills acquisition and ensuring retention of these skills.

Table 7.3 presents a detailed model for talent creation and staff development in the school.

Table 7.3: Talent creation in the school

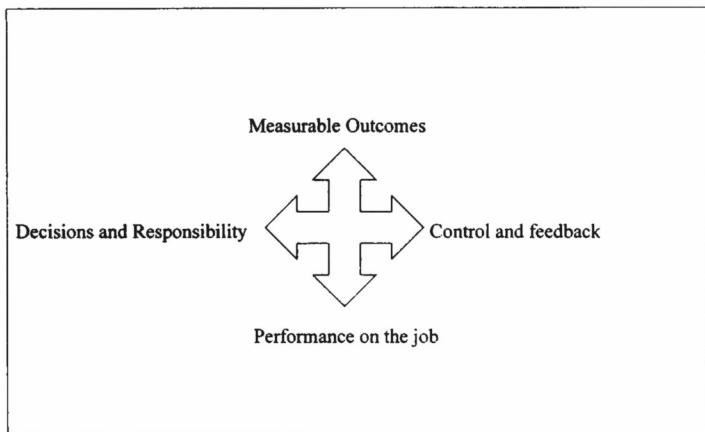
Phase	Action	Product
Identify training needs	Gather and analyse appropriate information	A description of the specific training needed to improve job performance
Map the approach	Define what needs to be learned to improve job performance and choose the appropriate training approach	Detailed objectives for the training model A design plan for the training model
Produce learning tools	Create actual training materials	Training manuals, facilitator's guides, audio-visual aids, job aids etcetera
Applying techniques	Deliver training as designed to ensure Effective results	Instructor-led training, computer-based training One-to-one coaching etcetera
Calculate measurable results	Assess whether training/coaching accomplished actual performance improvement; communicate the results, redesign [if necessary]	An evaluation report; a redesigned course [if necessary]
Follow-through	Ensured that the impact of training does not diminish	Ongoing suggestions and ideas that support training

Source: Sparhawk (1994:14)

The preceding Table 7.3 provides a blue-print for talent creation and development in the school situation. It is the researcher's view that any form of intervention

should be based on the gap that has been identified either in practice or possession of knowledge. Any model of management and leadership development should be progressive and had continuous assessment and feedback. For this reason, Figure 7.6 presents how an enrichment model may be implemented in a school.

Figure 7.6: Model for enrichment in a school



Adapted from van Deventer et al. (1990).

From Figure 7.6 it appears that talent creation cannot be a once off process, it should be a phenomenon with different phases. This then necessitates that an array of strategies be developed to ensure effective talent creation.

#### 7.4.2 Strategies for talent creation in schools

It seems rather inadequate and inward-looking to design a single strategy for talent creation in any organisation since times change and one person's needs may not be the needs of the other. Thus, a number of strategies are suggested for management and leadership development in schools in Box 7.1.

## Box 7.1

## Strategy 1

- Education and training system should be responsive to the skills needs: in a high quality education system concern is with producing the appropriate and required skills as a need arises;
- Education and training initiatives should be relevant to business activity: skills and talent development should be in line with the needs of the schooling system;
- Competitiveness in the face of globalisation: the fact that schooling is being turned into business with emphasis on outcomes and not inputs necessitates that school managers be exposed to models that would enable them to be competitive as individuals and to lead competitive schools

## Strategy 2

- Instil a culture of lifelong learning and a sense of discipline: there is always a tendency that when people are appointed to management posts they think that they had reached the apex of their careers.
- Equip learners with an integrated view of knowledge, skills, values, understandings and attitudes: one aspect that school managers should internalise is of an integrated view of knowledge.

## Strategy 3

- Respond quickly to the changing needs: one area of expertise that most school managers lack is that of responding promptly to changes in the education sector and in life in general. The skill to forecast and extrapolate may assist school managers even to anticipate changes and plan for changes in the school situation;
- Provide a critical interface between the general schooling system and the working world: most schools still operate in isolation and do not create a link between themselves and the outside world. Technically, these schools are irrelevant because they do not base their operations on tangible needs in their environments;
- Create opportunities for educators to upgrade their skills on a continuous basis: there is a need for educators to upgrade their qualifications, skills and knowledge and it is the responsibility of school managers to encourage this.

#### Strategy 4

Using training as an instrument to transfer knowledge, skills and attitudes by focusing on:

- The real needs and problems of the target group: the researcher is of the view that the real and not imagined needs of school managers should be the basis of any management and leadership model;
- The possibility of integrating training with other interventions: it is necessary that a training model for school managers be supported by on-site support and assistance in order to enable school managers to improve practice;
- Training interventions should be based on the knowledge of the people, their environment, major problems and aspirations: management and leadership models should be based on research to address problems school managers encounter on a daily basis.
- Training should not be provided as a social service, but as a response to market stimuli: management and leadership development models should be based on the need to improve conditions in the school.

#### Strategy 5

To ensure that training pays dividends, the following policy issues should be considered:

- Target and diversify training programmes according to the needs of trainees: training for the sake of training does not only waste time and resources, it also disrupts schools since nothing out of the training model benefits the school while its school manager was taken from the workplace for days-on end;
- Involve all key players at the local level in a combined effort to develop a training model that responds to the local needs: integrated quality management system [IQMS] seems a relevant strategy for revealing gaps that may need intervention or training model that is aimed at assisting school managers to improve on their practice.

The above-listed strategies should capacitate those who design management and leadership programmes to have a holistic view when attempting to assist school managers to improve their performance and practice in schools. Having provided the strategies for talent creation in the schooling system, focus would now be on assessment criteria.

### 7.4.3 Assessment criteria

It would be disingenuous to propose a single approach to assessing a model on management and leadership development, and consequently the researcher suggests integrated assessment for this aspect. Assessment criteria suggested above may be backed with tangible proof and outcomes in the form of a staff development. However, school managers who had undergone training under the model should be assessed particularly on the following:

- Ability to assist and draw up a career progression plan for staff members.
- Ability to challenge, influence and motivate others to achieve high goals. A portfolio presented indicating sessions on staff motivation would be welcome; and
- Assist in development of staff development plan for the school.

Focus would now be on developing an efficient organisational strategy.

## 7.5 DEVELOPING AN EFFECTIVE ORGANISATIONAL STRATEGY

Operational strategies are essential in schools, and since schools are business units they should therefore be competitive and productive. For this reason, each school should have operational plans and targets. The Model should enable school managers to state the problems/opportunities facing their schools, and list the assumptions, risks and obstacles that face their schools. The following discussion focuses on outcomes of the Model.

### 7.5.1 Outcomes in relation to organisational strategy

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In the fore-going discussion the significance of an effective organisational strategy was inferred by developing a strategy for dealing with the school's resources effectively. The Model should assist school managers to

- Identifying and solving problems in that responses display responsible decisions using critical and creative thinking had been made [SO1];
- Collecting, analysing, organising and critically evaluating information [SO2]; and
- Communicating effectively in using visual, mathematical and/or language skills in the modes of oral and written persuasion [SO3].

The critical cross-field outcomes that are mentioned in the preceding discussion are linked with the specific outcomes aimed at assisting school managers to have capacity to develop effective organisational strategies. The specific outcomes outlined include:

- Specific Outcome 1: The ability to think creatively and strategically;
- Specific Outcome 2: To understand and apply reflectively relevant content knowledge and skills in the management and leadership of schools; and
- Specific Outcome 3: Commitment to enable educators and learners to reach their full potential.

In present-day schooling systems managers need to reflect on how things are in the school situation. Reflective management assists in improvement of practice and development of intervention strategies when the need for these arises. The following discussion would explain further the notion of organisational strategies.

#### 7.5.2 The essence of an organisational strategy

The researcher observes that the school exists for a purpose and therefore it needs an operational strategy. According to Hargreaves and Hopkins (1991:128), a strategy provides a framework for solving problems in development planning, and includes:

- A definition of the purpose or goal to be reached;
- An outline of the main pathways to reach the goal;
- A planned time frame for reaching the goal; and
- An estimate of the cost (time, money, personnel and other resources).

From the preceding discussion it can be construed that a organisational strategy should be based on the vision and mission statements of the school. It is also observed that the school's operational strategy requires that certain procedures be followed before the strategy is finalised. For example,

- Audit: a school reviews its strengths and weaknesses/limitations;
- Construction: priorities for development are selected and then turned into specific targets;
- Implementation: the planned priorities and targets are implemented; and
- Evaluation: the successes of strategy implementation are checked.

The following discussion should assist in the management and leadership development model since it would elucidate the fundamentals of strategy formulation.

#### 7.5.2.1 Factors to consider when doing the school's audit

An audit is similar to stock-taking and it enables the school manager to know the quality of resources – both human and material – that are available in the school. In many competitive organisations audits are taken with a view of improving grey areas that are identified. An audit in the school should be conducted with an aim of improving areas that need attention and redistributing resources if they are congested in one area. The model should assist in management and leadership development since organisational strategies hinge on resource and process

allocation. Table 7.4 provides a synopsis of the school context and content when conducting an audit.

**Table 7.4:** The school context and the school content

<p>The school's context</p> <hr/> <ul style="list-style-type: none"> <li>• Mission</li> <li>• aims and values</li> <li>• policies</li> <li>• reviews of the school</li> <li>• views on the school</li> </ul> <hr style="border-top: 1px dashed black;"/> <p>The school's content</p> <hr/> <ul style="list-style-type: none"> <li>• assessment and recording</li> <li>• management and organisation</li> <li>• relationships with parents</li> <li>• resources</li> <li>• learners' diversity and achievements</li> </ul>
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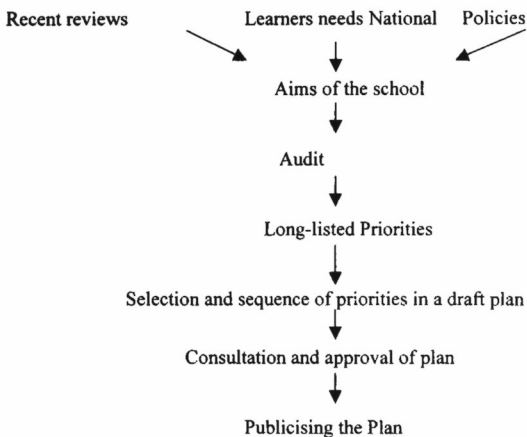
From the fore-going Table 7.4 it would appear that a two-pronged approach should be adopted when compiling a school's audit. For example, there should be a balance between the context and the content of the school. Accordingly, the Beehive Model does not only propose an audit of only resources, but rather it suggests an audit of the whole school since deficiencies in one area may impact on other areas. On the basis of the data collected in the school, one may be able to construct a well-informed organisational strategy for the school.

#### 7.5.2.2 Constructing a school's strategy

The more carefully the organisational strategy is developed, the easier it is to manage the process of implementation. According to Hargreaves and Hopkins (1991: 40), the construction of the strategy should also involve taking account of the context; making decisions about priorities; and writing up and publicising the plan. It is assumed that by taking into consideration the above-mentioned factors, one would be enabled to construct an appropriate strategy for the school. Such a

strategy would be strengthened by the contributions of stakeholders and other people who are consulted during its planning stage. Figure 7.7, as adapted from Hargreaves and Hopkins (1991: 49), presents essentials for constructing a school's organisational strategy.

Figure 7.7 The construction of the development plan



From the Figure 7.7 one can deduce that an organisational strategy should address the needs of the learners, the community and the country at large. However, of interest is that the strategy may be too broad and thus, to ensure that its targets are met within reasonable time, school managers should develop action plans. According to Hargreaves and Hopkins (1991:50), an action plan describes the model of work to be undertaken in the school and it contains:

- Priorities as described in the strategic plan;
- Targets, or the more specific objectives for the priority;
- Success criteria or performance indicators;
- Tasks to be undertaken to reach each target;
- Allocation of responsibility;

- Date for meetings to assess progress and
- Resource implications.

It is noted that the Model suggests a systematic and a logical implementation of plans to the school.

### 7.5.2 Implementation of a school strategy

The school's strategy cannot be implemented if all staff are not aware of it. The school manager who understands the dynamics of organisation and operations, for example, Hargreaves and Hopkins (1991:67) state that the successful realisation of the school's strategy requires the school manager to:

- Re-examine organisational aims
- Establish operational rules/policies
- Schedule work packages
- Staffs work packages
- Sustain commitment
- Establish progress reporting systems
- Monitor progress against the strategy plan/aim
- Provide regular progress checks

Evidently, the successful implementation of organisational strategy depends largely on the school manager. The success of the strategy in the form of a continuing development programmes are dependent on the school manager's long-term vision of a school. Hargreaves and Hopkins (1991:67) note that an organisation can best realisation and sustain goals when school manager is able to:

- Showing more of his or her own energy and time to get started on it
- Making themselves personally responsible for the quality of the strategy available to all, through progress and problem-solving
- Holding meetings to provide help, give advice and set high standards

There is much that school managers can do to turn schools around and into productive units. However, this may be possible if their work is assessed on a regular basis.

### 7.5.3 Assessment criteria

The Model is based on the premise that school managers would be assessed on skills and knowledge to:

- Develop policies, plans and targets in ways that establish shared vision and direction in the context of the school;
- Ensured curriculum coverage, continuity and progression in the learning areas;
- Set expectations and targets for staff and learners in relation to standards of learners achievement; and
- Identify effective practice and areas for improvement and take appropriate measures to further the quality of teaching.

It is assumed that when the above-mentioned requisites are in place in schools, society at large would begin getting returns from their investment in education.

## 7.6 CREATING FUNCTIONAL STRUCTURES IN SCHOOLS

Functional structures are essential for effectiveness in schools. The school is like a human body: it has interrelated components and these serve specific functions (cf. 2.4). The implication hereof is that the school should have functional structures and outcomes of these structures should be self-evident. Structures should be assessed on a continuous basis in order to check if they are fulfilling their roles effectively and efficiently (cf. 3.6). While it remains the responsibility of the school manager to encourage structures to be competitive, the manager should



The preceding specific outcomes are linked with the creation of functional structures in schools.

### 7.6.2 Creation of functional structures in the school

Most schools do have structures even if some of these structures are created without any vision in mind. One-way of ensuring that structures in schools fulfil their mandates is by using a Balanced scorecard [BSC] as indicated in Table 7.5.

Table 7.5: A balance scorecard

	Objectives	Measures	Targets	Initiatives
Financial	Raising an x amount of Rands	Fund raising and donations	Learners Parents Business	Fun walk Raffles Donations
Client service	Providing effective and efficient service	Quality teaching Prompt response to queries	Educators Learning material Senior management	Using a variety of teaching strategies Workshops Material development

From Table 7.5 one can notice that the school has structures that focus on particular functions and each of the structures has its objectives, measures [for operation], targets and initiatives. In this type of a set-up the role of management is to check if each of the structures manage to reach its targets. In line with the Model, structures that struggle to meet their targets should be given assistance to succeed.

### 7.6.3 Assessment criteria

Assessment in the Beehive Model focuses on whether the school manager has the skills to become an assessor of operations in the school and an initiator who:

- Is able to challenge, influence and motivate others to achieve high goals;
- Initiates structures and processes that share leadership and help staff work collegially in teams to meet the mission and goals of the school; and
- Understands and applies operations of structures in relation to developing processes for developmental appraisal and performance review.

In organisations where managers had been thoroughly trained in management of structures, they also act as personnel ensuring application and implementation of reward systems.

#### 7.7 ENSURING STAFF MOTIVATION THROUGH PAY AND INCENTIVES

In some organisations, performance appraisal is used to determine the level of productivity of the employee by providing evidence for productivity-linked pay (Dawson 1993:176). Apparently, pay progression is a responsibility of an individual employee and the manager ensures that deserving employees get their fair share of a profits. However, pay progression may not be implemented easily in the education sector since most of school managers and IQMS teams have not been exposed to integrated approaches for determining an employee or educator's level of competence.

Indubitably, schools should attract competent employees by structuring salary packages that tempt people to apply for the teaching jobs (cf.3.8). In addition, salaries offered to personnel working in schools should also be able to retain such employees, because many other organisations would be seeking their services as effectively. From the fore-going discussion it can be deduced that if the education sector are to introduce competency-related remuneration, then school managers are to be well-trained to implement this innovative approach to salary progression.

### 7.7.1 Outcomes of motivation through pay and incentives

To effectively and efficiently implement a system of payment and incentives for hard-working and diligent educators necessitates that the Model be aimed at equipping incumbents for:

- Reflecting on and exploring a variety of strategies for effective learning [SO3];
- Organising and managing oneself and one's activities responsibly and effectively [SO1, SO2]; and
- Working well with others as a member of a team, group, organisation or community [SO2].

In addition, the Model propounds that a manager should demonstrate the following specific outcomes:

- Specific Outcome 1: Demonstrates the personal qualities for effective management and leadership;
- Specific Outcome 2: Demonstrate the ability to motivate others to participate in the development of vision, school policies and plans and carry these forward; and
- Specific Outcome 3: Have the ability to Model good teaching and learning and lead by example.

It is apparent that the Model would enable a school manager to motivate educators to work to the best of their abilities. For this reason, a motivating environment assists staff to:

- Have competence and confidence in their abilities;
- Be part of a fair incentive scheme;
- Have good performance acknowledged;
- Have concrete and specific performance goals; and

- Have regular feedback.

It is apparent that acknowledgement of good performance would enhance staff motivation. This relates well with human relations approaches to leadership (cf 2.2.1.6), and it creates harmony between organised labour and management. This should become clearer in Table 7.6.

Table 7.6: Motivation and Performance

Problem	Solution
Working hard does not improve performance	Design jobs so that hard work produces results
High levels of performance Do not receive rewards	Introduce payment by results

Adapted from Dawson (1993: 77).

From the preceding Table 7.6 it is evident that there may be a need to pay and give deserving employees some incentives. Reward systems must motivate everybody, rather than a select few since to reward a few is to give out the message that some people are more valuable than others. There are claims that educators are over-worked and under-paid (cf 1.5) and this is said to be one of the reasons for a poor work ethic in South African schools. It would appear that people will be more willing to work hard if they have benefits such as financial benefits, job security and promotion (Morrison 1998:132). Nevertheless, this may be a tricky undertaking if some of the staff members contest the decision of school management on allegations that the manager used favouritism and not good performance as a criterion for the reward.

#### 7.7.2 Assessment criteria

The Model for management and leadership development should be assessed through tangible outcomes that indicate that the school manager has the:

- Ability to seek and use information to guide judgement and decision-making on talent creation and utilisation;
- A commitment to following through the vision and mission of the school in detailed planning of the day to day life of the school;
- Treating people fairly, equitably and with dignity and respect to maintain a positive school environment; and
- Showing appreciation for the work of educators.

Surely, a manager who has been exposed to the management and leadership development model should be able to control his/her prejudices in order to ensure that only deserving employees get the reward they deserve. Favouritism always breeds a culture of dependency and dissatisfaction while it also compromises standards.

## 7.8 MANAGING CHANGE IN THE SCHOOL SITUATION

Change management is essential not only for the mental health of educators, but also for maintaining stability in schools. On the other hand changes in the school's environment necessitate reciprocal changes in the school (cf. 3.9). It is necessary that whenever there are changes in the environment personnel in the school situation embrace this change and use it to the school's advantage. Managers with a good background of change management understand that change management entails mapping out a vision of the school and indicating alternatives for whatever may transpire out of the changing situations. The Model also suggests a proactive approach to change management and thus regards a multivalent approach to school operations a necessity.

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### 7.8.2 The seven A's of change and Strategies to help individuals to cope with change

Different people respond in different ways to changes in their lives. For example, most school managers are aware of what their roles are (or should be), however they always find it difficult to cope with demands of changes in schools. In line with the Model, change should always produce a reaction whether such reaction is negative or positive. Table 7.7 presents some of the ways of dealing with change.

Table 7.7: The seven A's of change

Phase	Critical questions
Awareness	Find out more about intended changes
Attention	Focus the attention of people to the intended
Apprehension	Address fears, make room for
Adaptation	Facilitate change by removing all baggage
Acceptance	Check if strategies fit in with the intended change.
Action	Fuel the momentum for change.
Assimilation	Frequent assessment of outcomes

Table 7.7 indicates that the difference between one who has been trained to deal with change and the one who was not trained to deal with change is that those who know that change is real and part of life become more prepared to deal with change than the others. Nevertheless, a school manager trained in change management may assist the staff to deal with change as in Table 7.8.

Table 7.8: Assisting individuals to deal with change

Stage	Main elements	Typical feelings, thinking and support	Coping mechanisms
1	Loss	Feelings of fear, shock, cautious thought, paralysed behaviour	Counselling
2	Doubt	Feelings of resentment, thoughts are sceptical, behaviour is resistant	Staff development model
3	Discomfort	Feelings of anxiety, confused thoughts, unproductive behaviour	Process transplant Consultation
DANGER ZONE			
4	Discovery	Feelings of anticipation, creative thoughts, energised behaviour	Discussion forum Workshops
5	Understanding	Feelings of confidence, pragmatic thoughts, productive behaviour	New values New opportunities New goals
6	Integration	Feelings of satisfaction, focused thoughts, generous behaviour	Empowerment Responsibilities

### 7.8.3 Assessment criteria

Assessment of change leadership in a school situation requires that one looks for tangible outcomes and competencies linked to school administration, the climate prevailing in the school and relations of the school with learners, parents, the community and other stakeholders. In addition, a school manager should be assessed through his/her:

- Ability to read trends and to anticipate changes that may affect the school;
- Effective planning to ensure that change does not destabilise the school;
- Effective communication to minimise resistance to change and also to get the support of stakeholders; and
- Forge partnerships with different interest groups in order to have a broad reference group that would ensure that the school taps on internal and external expertise to manage change.

From the preceding discussion it is obvious that one who has been trained in change management is able to read trends, extrapolate and think about alternative

futures for the school. A practical example is a school manager who has already planned for the time when more than half of the learners in the school may be HIV/AIDS orphans. Problems that may be encountered include non-payment of school fund, dealing with a traumatised learner, dealing with sick learners etcetera. It would then appear that to overcome these problems [that are not experienced now but may affect the school in future] may require forging networks, having a counselling centre for both educators and learners in schools etcetera.

## 7.9 SUMMARY

Faced with changing markets, advanced technology and increased competition, many institutions understand that success requires not only capital and technological improvements, but also changes in the way human relations are managed. Profitability and efficiency do not only depend on getting people going, but also on serving people. The two preceding assertions emphasise the importance of developing and forging links with people who are linked with a school. For this reason, public relations constitute an important and integral part of the school manager's responsibilities. Hence, the neglect of creation of effective relations with the very clients who are served by the institution may lead to aversion and alienation and consequently, rather than appreciating their effective points, they would exaggerate their weaknesses. It is noted that the Model advances the following points:

- Stakeholder participation (cf. 7.2);
- Creation of structures (cf. 7.6);
- Business discipline (cf. 7.3);
- Talent creation (cf. 7.4);
- Pay and incentives (cf. 7.7);
- Change leadership and management (cf. 7.8);
- Operational strategy (cf. 7.5).

Having discussed the Model for management and leadership development for primary schools in Bojanala East and Bojanala Regions, focus in the next chapter would be on summary, findings, recommendations and conclusion.

## CHAPTER 8

### SUMMARY, FINDINGS, RECOMMENDATIONS AND CONCLUSION

#### 8.1 INTRODUCTION

The Beehive Model promotes effective utilisation of human resources in carrying and attaining organisational objectives. For example, stakeholder participation in decision-making structures ensures that they – stakeholders – own the decisions and programmes an organisation engages in. Similarly, by engaging stakeholders in decision-making processes, management provides a platform for development of their –stakeholders’ – innate abilities and talents. As a result, it is observed that organisational development is enhanced when one accepts the concept of genuine participation through that people agreed on what development means.

From the preceding discussion it can be deduced that the notion of stakeholder participation suggests that schools and *Staff Rooms*, are no longer the private domains of management and leadership, but they are progressively developing to be institutions in that all stakeholders share values and outcomes through consultative processes. The pre-eminence of participative leadership and management in organisational development is based on the assumption that empowering people may result in a more responsive, more flexible, and ultimately more effective enterprise. Participative leadership is more than a willingness to share influence, it entails formal patterns of participation through that stakeholders are not only objects for organisational development, but active partners for the daily operations in a school. The shift to participative leadership in institutions is both inevitable and necessary since issues that are faced in the workplace are too complex to be solved by a few people in authority.

It is also acknowledged that the new world economic environment has changed the structure of the labour market. For this reason, the evaluation of the

production systems needs to go beyond assessing short-term results to encompass organisational, personal and process aspects that are critical for sustained organisational development. It seems viable therefore, to suggest that sustained development is interlinked with systems that provide skills demanded in competitive productive systems. Surely, in the evolving environment of rapid and fundamental changes to education, training and development of human resources, efficacious school management and leadership would become the driving influence behind meeting the demand for highly skilled person-power not only in the education sector, but also in all sectors concerned with national development.

The chapter focuses on:

- the summary of the research;
- research findings;
- recommendations; and
- conclusion.

## 8.2 SUMMARY

The research on the Beehive Model involved literature study and an empirical investigation in primary schools in Bojanala East and Bojanala Regions. The following summary is presented on the activities undertaken in the study.

Chapter 1 focused on orientation in the research. The following were areas covered in the research:

- aims and objectives of the research: the aims of the research were outlined under 1.2;
- significance of the research: it was stated that the investigation on the Beehive Model for management and leadership development was significant in order to empower personnel in schools to cope with changes in the education sector (cf. 1.3). Furthermore, the study was said to be

significant for assisting in changing the attitudes of school managers and educators to be more open to changes in the education sector (cf. 1.3); it was also asserted that the study had a universal and particular dimension in that while it focused on North West Province, it would also juxtapose the South African situation with situations in other parts of the world.

Chapter 1 also presented the statement of the research problem. A discussion on the statement of the research uncovered that:

- there was lack or minimal accountability in the schooling system (cf.1.5);
- the South African schooling system was under-performing when compared with others systems throughout the world (cf. 1.5); and
- there was deficient management and leadership in the schooling system (cf. 1.5).

The chapter also presented preliminary information on the research method (cf. 1.7), sampling techniques (cf. 1.7.2), and data analysis techniques (1.7.3).

Chapter 2 dealt with the conceptualisation of the significance of management and leadership development in schools. Management was perceived as being concerned with planning, organising and actuating and controlling school operations (cf.2.2). Chapter 2 also focused on conceptualisation of leadership theories and the following theories on leadership were discussed:

- McGregor's leadership assumptions (cf.2.3.1);
- Ouchi's Theory Z (cf.2.3.2);
- Schein's assumptions on leadership (cf.2.3.3);
- The social assumption theory on leadership (cf. 2.3.4);
- Blake and Mouton's leadership grid (cf. 2.3.5);
- Tannenbaum and Schmidt's continuum in leadership (cf. 2.3.6); and
- Hersey and Blanchard's situational leadership theory (cf. 2.3.7).

Chapter 2 also dealt with approaches to management. The following approaches were explained:

- Frederick Taylor's classical-scientific management approach (cf. 2.4.1.1);
- Fayol's classical-scientific approach (cf. 2.4.1.2);
- The human relations approach (cf. 2.4.2);
- The systems approach to management (cf. 2.4.3);
- The contingency approach (cf. 2.4.4);
- Spatio-temporal situatedness and management (cf. 2.4.4.1);
- Linking management strategies to employees (cf. 2.4.4.2);
- The concept of effective leadership in schools (cf. 2.5.1);
- The role of the school manager in change management (cf. 2.5.2);
- Transactional and transformational leadership (cf. 2.5.3); and
- Essentials of effective school management (cf. 2.5.4).

Chapter 2 also suggested that management was essential for:

- Building group cohesion (cf. 2.5.4.2);
- Resource allocation (cf. 2.5.4.3);
- Effective organising in schools (cf. 2.5.4.4);
- Leading, resource mobilisation and utilisation (cf. 2.5.4.4);
- Information disclosure and dissemination (cf. 2.5.4.5); and
- The task of the school manager in quality assurance (cf. 2.5.4.6).

Chapter 3 dealt with conceptualisation of principles of the Beehive Model for management and leadership development. The chapter focused on the following:

- Stakeholder participation (cf. 3.2);
- Participatory management (cf. 3.2.1);
- Partnerships and organisational development (cf. 3.2.2);
- Business discipline (cf. 3.3);
- Ensuring effectiveness and quality in schools (cf. 3.3.1);
- Team-building for organisational development (cf. 3.3.2);

- Talent creation (cf. 3.4);
- Talent as an elusive and scarce commodity (cf. 3.4.1);
- The rise of a utilitarian and functionalist approach in education (cf. 3.4.2);
- Organisational strategy (cf. 3.5);
- Planning and organisational strategy (cf. 3.5.1);
- Organising and organisational strategy (cf. 3.5.2);
- Control and organisational strategy (cf. 3.5.3); and
- Guidance and attainment of an organisational strategy (cf. 3.5.4).

Chapter 3 also provided a discussion on the following issues:

- Structures and effectiveness in schools (cf. 3.6.1);
- Structures, commitment and organisational development (cf. 3.6.2);
- incentives and staff retention (cf. 3.7.1);
- ethical considerations in awarding incentives (cf. 3.7.2);
- change management and organisational development (cf. 3.8);
- change management and leadership in context (cf. 3.8.1); and
- stakeholder participation in the change process (cf. 3.8.2).

Chapter 4 dealt with management and leadership development models in the UK, USA, Tanzania and RSA. The chapter also focused on some factors influencing education management and leadership in South African schools. The following issues were raised in the discussion:

- the essence of different roles, skills, and aptitudes in education management (cf 4.2.4);
- the quest for quality education (cf. 4.2.5);
- management and leadership development models in UK (cf. 4.3.1);
- recruiting and training school managers in USA (cf. 4.3.2);
- school management and leadership development in Tanzania (cf.4.3.3);  
and
- school management and leadership development in South Africa.

Chapter 4 also drew attention to challenges for school management and leadership in the new dispensation in South Africa. The following pertinent issues were discussed:

- management of diversity in educational contexts (cf.4.4.1);
- change management and transforming schools into productive learning sites (cf. 4.4.2);
- democratisation and school management and leadership in schools (cf. 4.4.2.1);
- education management in a decentralised schooling system (cf.4.4.3); and
- the quest for school effectiveness in RSA.

Chapter 5 dealt with a detailed exposition of the research methodology. The following topics were discussed:

- research design (cf. 5.2.1);
- sampling and sampling methods (cf. 5.2.2);
- aspects of measurement fundamental to measuring instruments (cf. 5.3);
- validity (cf. 5.3.1);
- content validity (cf. 5.3.2);
- face validity (cf. 5.3.3);
- triangulation (cf.5.3.4); and
- research instruments.

Chapter 6 dealt with data analysis. The following aspects were discussed:

- age of respondents (cf. 6.2.1);
- position of respondents in the school (cf. 6.2.2);
- location of the school (cf.6.2.3); and
- gender of respondents (cf. 6.2.4).

Chapter 6 also dealt with item analysis under the following headings:

- stakeholder participation in school affairs and activities (cf. 6.3);
- structures in schools (cf. 6.4);
- pay and incentives (cf. 6.5);
- talent creation in schools (cf. 6.6);
- change management in schools (cf. 6.7);
- management and determination of operational strategies in schools (cf. 6.8);
- school effectiveness in meeting targets (cf. 6.9); and
- tests for statistical significance (cf. 6.10).

Chapter 7 dealt with the Beehive Model as a model for management and leadership development for primary schools in Bojanala West and Bojanala East primary schools. The following aspects were discussed in detail:

- enhancing stakeholder participation in schools (cf. 7.2);
- critical cross-field outcomes (cf. 7.2.1);
- specific outcomes (cf. 7.2.2);
- ensuring stakeholder participation in schools (cf. 7.2.3);
- assessment criteria (cf. 7.2.4);
- developing business discipline (7.3);
- ensuring talent creation and utilisation in schools (cf. 7.4);
- developing an effective organisational strategy (cf. 7.5);
- creating functional structures (cf. 7.6);
- ensuring staff motivation through pay and incentives (cf. 7.7); and
- managing change in schools (cf. 7.8).

### 8.3 RESEARCH FINDINGS

Research findings were linked to the aims of research as indicated under 1.2.1, and the following discussion explains the findings of the research.

**AIM 1:** To describe the nature and scope of organisational management and leadership

An extensive literature study was conducted and it assisted the researcher to present a discussion on the essence was found that there were various types and approaches to management and leadership such as McGregor's leadership assumptions (cf.2.3.1); Ouchi's Theory Z (cf.2.3.2); Schein's assumptions on leadership (cf.2.3.3); The social assumption theory on leadership (cf. 2.3.4); Blake and Mouton's leadership grid (cf. 2.3.5); Tannenbaum and Schmidt's continuum in leadership (cf. 2.3.6); and Hersey and Blanchard's situational leadership theory (cf. 2.3.7). It was also found that management and leadership were significant for building group cohesion (cf. 2.5.4.2); the significance of judicious resource allocation (cf. 2.5.4.3); effective organising in schools (cf. 2.5.4.4); appropriate information disclosure and dissemination (cf. 2.5.4.5).

**AIM 2:** To discuss the essence of management and leadership development models in the Republic of South Africa

Through literature`study it was found that changes within the South African context necessitate an appropriate change in the schooling context. The following points form the highlights of findings under the aim of discussion the essence of management and leadership development in South Africa: management of cultural diversity in educational contexts (cf. 4.2.1); management of diversified learning processes (cf. 4.2.2); change management and the role of the school manager (cf. 4.2.3); the implications of democratisation and transformation for schooling (cf. 4.2.4); the quest for acquisition of values and a human rights culture (cf. 4.2.5);

and education management in a multi-dimensional education and training system (cf. 4.3.1). It was also uncovered that integrated management and leadership development is necessary in South African schools

**AIM 3:** To clarify principles of the Beehive Model and how they relate to management and leadership development

A discussion of the principles of the Beehive Model was presented after extensive literature study was conducted. The following points became lucid in the discussion: functional structures were important in schools (cf. 3.6); structures ensured effectiveness in schools (cf. 3.6.1); structures enhance commitment and organisational development (cf. 3.6.2); pay and incentives were used for attracting and retention of staff (cf. 3.7; cf. 3.7.1); there were ethical considerations in awarding incentives (cf. 3.7.2); school managers should ensure effective change management and organisational development (cf. 3.8); there is a need to put change management and leadership in context (cf. 3.8.1); and it is necessary to ensure stakeholder participation in the change process (cf. 3.8.2).

**AIM 4:** To undertake an empirical investigation on management and leadership development in primary schools in Bojanala East and Bojanala Regions

An empirical research was conducted in Bojanala West and East Regions and the following findings were made: stakeholder participation is necessary in school affairs and activities (cf. 6.3); there is a necessity to develop structures in schools (cf. 6.4); managers should use pay and incentives to motivate, attract and ensure staff retention (cf. 6.5); it is necessary to ensure talent creation in schools (cf. 6.6); there is a need for effective change management in schools (cf. 6.7); it is significant to have management and operational strategies in schools (cf. 6.8); and all measures should be undertaken to ensure school effectiveness in meeting schools' targets (cf. 6.9).

## 8.4 RECOMMENDATIONS

After a thorough study was conducted the research objectives have been met for management and leadership development using the Bago's model and approach. This was discussed in Chapter 7. However, the final key recommendations were presented for ensuring the effective implementation of the Bago's Model for management and leadership development.

### 8.4.1 Recommendation 1: Management and leadership developers should encapsulate an understanding of theories of management and leadership.

Leadership requires eliciting cooperation from a large network of people, and keeping key people in that network motivated and obliging them to a shared vision. Against the background of the increasing size of schools, leaders should be concerned about the 'big picture' and the long-range future of an organisation. As a result, leaders should be capacitated to create and articulate organisational visions. People in leadership positions also need interpersonal behaviours that enable them to influence followers to cooperate in the general pursuit of objectives. School leaders should thus be trained to focus and articulate goals for schools.

Just as leadership skills are essential in schools, management experiences should be nurtured and enhanced. To this end, school managers should involve fair compensation to educators. In addition, school managers should ensure the safety of educators by drawing up safety policies that prevent the distribution of burdens in schools. It is also observed that educators should be provided with opportunities for self-development in order that they realise that there is growth and security in their career. For this reason, training programmes should be developed to avert skill obsolescence in schools. The role of school managers in social integration of educators should not be underestimated. As a result, encouragement and motivation should be provided for educators, and they participate in activities of professional organisations.

#### 8.4.2 Recommendation 2: Appropriate and relevant models should be developed for management and leadership development for South African schools

As a country that is currently in the midst of major changes, South Africa needs a new type of leadership – both at middle and senior levels – within schools and educational institutions. The premise here is that effective school management is essential for a speedy, effective and efficient delivery of educational services. Education management in the evolving context should lead to the transformation of schools into effective institutions that do not only promote the re-generation of culture, but also into institutions that imbue learners with creative and competitive skills.

Changes in the broader social environment in South Africa necessitate reciprocal changes in school management and leadership in order to assist educators and learners to achieve the unity of their being, but also to acquire a unified understanding of the present-day world. However, it is concluded that the delivery of quality education had been paralysed by lack of management capacity in many historically disadvantaged schools. In addition, it appears that a high percentage of school managers in South Africa are poorly qualified and they had received inadequate preparation and training prior to their appointment as school managers. In the light of the preceding statement it is lucid that effective school management may be attained only if appropriate and effective models are readily available for school management and leadership development for South African schools.

#### 8.4.3 Recommendation 3: The Beehive Model should be adopted for management and leadership development for South African schools

Acceptance of the principles of the Beehive Model should capacitate schools and school managers in particular to fulfil the multi-functional demands of school management and leadership. For example, stakeholder participation should be enhanced in schools, and school managers should be capacitated to work

effectively with stakeholders and to involve them in all the activities that need their contribution. The spirit of partnership should be enhanced at all times in order to maintain and develop business discipline in schools. Business discipline is essential if schools are to be effective in carrying out their mandate of socialisation and equipping learners for an active and meaningful life in society.

Furthermore, talent creation and utilisation should be promoted in schools, and all attempts should be made to nurture optimisation of the diverse talents and abilities of educators and learners. The Model should assist school managers to be able to identify the latent talents of educators and motivate them [educators] to develop these talents. However, talent creation should not be the only concern of school managers, they should also be able to keep the talent in the school by using pay and incentives. Pay and incentives are necessary for increasing educators' motivation and staff retention rates in schools. It is also observed that the Model should capacitate school managers and leaders to manage changes in the school situation. Change management is essential not only for the mental health of educators, but also for maintaining stability in schools.

Adoption of the Beehive Model should assist schools develop operational and strategic plans aimed at social development and upliftment. In this case school managers would be capacitated to draw implementable and realistic strategic plans for their schools, and the strategic plans would be based on research in order to be relevant to the context of the school, community and the country at large. Ostensibly, strategic plans would be implemented properly if there were functional structures in schools, and school managers should ensure that these structures meet their targets.

#### 8.4 CONCLUSION

In terms of the Beehive Model the management and leadership development model should unfold the capabilities and latent talents of school managers. For example, the power and ability of the school managers to extrapolate and forecast alternative futures are significant for strategic planning and organisational development. In the light of the preceding statement strategic planning should assist the schools to avoid the so-called future shock that characterises changes in production systems. A strategic developmental plan should per se enhance the quality of production in a school. It is noted that the Beehive Model encourages focusing attention on the aims of education, teaching, management and leadership, school finance and resources, as well as capturing the vision of the school.

From the preceding discussion it is evident that the Beehive Model should enable the school to focus on achievement of its fundamental aims and strategic objectives. In terms of the Model effective planning in schools should entail setting up of quality assurance indicators and techniques since avoiding poor quality is a much more effective production strategy than rectification of poor quality. In addition, the Model should assist school managers to ensure quality in production by adopting appropriate standards when organising roles, functions and activities in a school. A model for management and leadership development has been presented and explained. However, the researcher is of the view that further research may improve the model in order to ensure that management and leadership in South African schools is improved so as to place the country at the centre stage of effective and efficient school management throughout the world.

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**Appendix 1: Letter of introduction**

North West University – Mankwe Campus  
Private Bag X1014  
Mogwase  
O314  
08 December 2003

**Dear Respondent**

You are humbly requested to spare some few minutes and respond to the questions in this questionnaire. The questionnaire is a tool used to collect data on “Management and leadership development in primary schools in Bojanala East and Bojanala Regions” that forms part of the Beehive Survey conducted by Mr I R Mathibe for his Doctoral Thesis. Please respond to the questions as genuinely as you possibly can since the aim here is to provide authentic and reliable data on management and leadership development in primary schools. There are no wrong or right answers and therefore you need not fear any form of recrimination. Your responses would be treated as confidentially as possible and no one would be penalised or victimised for his or her responses.

I thank you in advance for your sincerity and your time.

Yours sincerely

I R Mathibe

## Appendix 2: Questionnaire

The questionnaire has two sections: Section A and Section B. For Sections A and B please respond by putting a cross [X] next to the option you choose.

### Section A: Biographical Information

1 What is your gender?

1.1	Male	
1.2	Female	

2 What is your present position in the schools?

2.1	School manager	
2.2	HoD	
2.3	Educator	

3 In that age category did you fall?

3.1	25 – 30 yrs	
3.2	31 – 35 yrs	
3.3	36 – 40 yrs	
3.4	41 – 45 yrs	
3.5	46 +	

4 Where is your school situated?

3.1	Urban area	
3.2	Rural area	

## Section B

In this section a five [5] point Linkert scale is used with the following distribution: Strongly Agreed = 5; Agreed = 4, Unsure = 3; Disagreed = 2; and Strongly Disagreed =1. Please indicated your choice by marking a cross [X] in the block of your choice.

## 4 Stakeholder participation in schools affairs

		5	4	3	2	1
5.1	There are open lines of communication between the school and the homes of learners					
5.2	Parents and other stakeholders are consulted in all decisions taken in the school					
5.3	Educators are consulted when new policies are introduced in the school					
5.4	School governing body members are actively involved in drawing up of school policies					
5.5	Communication channels are known by all stakeholders and they are kept as open as possible					
5.6	The school accommodates the needs and diverse interests of stakeholders					
5.7	The school management team and educators encouraged parents to participate actively in the learning of their children					
5.8	Members of the school governing body had been trained to govern the school effectively					
5.9	Stakeholder participation establishes a effective public relations strategy for the school					
5.10	Mobilisation and participation of stakeholders ensured provision of quality education in the school					

## 5 Creation of functional structures [such as the SMT or SGB] in schools

		5	4	3	2	1
6.1	Structures had been established to ensure that effective teaching and learning took place					
6.2	There is congruency and synergy between the structures and the vision and mission of the school					
6.3	Structures are based on and promoted the principles of transparency, effectiveness and accountability					
6.4	Structures in the school had adopted their own unique constitutions and operational plans					
6.5	Structures write and provide reports about their operations					
6.6	Structures in the school did not only reflect the leadership and management and styles used, they also dictate the level to that the school may effectively attained its goals					
6.7	When structures are fully functional they promoted autonomy and entrepreneurship in the school					
6.8	Structures promoted flexibility and sharing of resources for several functions in the school					
6.9	When structures are well-coordinated there is a potential for cross-functional and multi-disciplinary teams in the school					
6.10	An institution-level educator support team in the school mobilises expert knowledge and skills from different fields of study to ensure better educational practices					

## 6 Enhancing staff morale and motivation

7.1	The senior management team acknowledges that needs satisfaction correlates with educators' level of motivation						
7.2	The senior management team ensures that teaching is intrinsically meaningful and challenging for educators						
7.3	Educators are given due recognition for their outstanding work and they are not only blamed when learners did not performed effectively						
7.4	Educators who are aware that they stand a chance to be promoted are more co-operative than educators who knew that they had reached the cul-de-sac in their careers						
7.5	Ambivalence about delegation of work creates conflict and it is the basis for educators' despondency						
7.6	In most cases educators performed below standard because they knew that the school does not offer any incentive for outstanding work						
7.7	Senior management team members are responsible for low output from educators particularly when they practise favouritism						
7.8	Educators who are better paid are more often dedicated to their work and they are even prepared to do extra work						
7.9	Rationalisation and redeployment programmes affect educators motivation and morale						
7.10	The school lost enthusiastic and dedicated educators to competitors in the private sector since these competitors offer them attractive salary packages and incentives						

## 7 Talent creation in schools

		5	4	3	2	1
8.1	Talent creation in the school is linked to the needs of the country for a highly skilled and competent workforce					
8.2	The school promoted an integrated development of talents, skills, knowledge, values and attitudes among learners and educators					
8.3	A diversified school programme is adopted to address diverse needs and talents of learners and educators					
8.4	Educators are encouraged to have a variety of skills and knowledge to provide for and respond to the needs of all learners					
8.5	An inclusive approach is adopted in the school with an aim of catering for the diverse needs of all learners					
8.6	While educators are allowed to specialise, they are also encouraged to acquire different skills as preparation for possible rationalisation in the education sector					
8.7	Talent utilisation is linked to effectiveness and productivity in the school					
8.8	The school offers a diversified curriculum to suit the diverse needs and talents of the learners					
8.9	The school has a network of relations with other agencies and used the expertise provided by these agencies to promote inclusive education					
8.10	Talent creation is done in line with the principles of equity and equality and therefore a variety of capacity building programmes run simultaneously in the school					

## 8 Change management in schools

		5	4	3	2	1
9.1	The senior management team capacitates educators adapt to changes in the schools situation					
9.2	The school has functioning linkages with its external environment and it is in touch with the needs of its clients					
9.3	The senior management team acknowledges that change is typified by fear, sense of loss and disruptions in the school					
9.4	The senior management team organises workshops for stakeholders in order to explain the impact of the envisaged changes on the school and its members					
9.5	Change management is not done in isolation and experts who understand change processes are invited to assist the school to deal with change					
9.6	The senior management team does not adopt changes verbatim as they had been instituted in other situations, but rather they adapt these changes to their unique situation					
9.7	Changes in the school are carefully planned and managed and they are introduced gradually in order not to disrupt the school's operational programmes					
9.8	Changes in the school are negotiated with the affected parties and attempts are made to reach compromises when necessary					
9.9	Changes are effectively implemented when there is a clearly articulated vision of what is to be achieved by the school					
9.10	Change management requires that stakeholders make significant paradigm shifts in their attitudes and behaviours					

### 10 Management and determination of operational strategies in schools

		5	4	3	2	1
10.1	Educators are represented in all decision-making structures in the school					
10.2	Rules, procedures, and regulations are understood by all stakeholders					
10.3	Educators are given roles to perform in the school and they are also given support by the senior management team					
10.4	The senior management team used transformational leadership style and not transactional leadership style					
10.5	The senior management team views all educators as self-motivated, committed, responsible and creative people					
10.6	The vision and mission of the school are clearly depicted and they are understood by those who had links with the school					
10.7	Stakeholders participate in formulation and reformulation of school programmes and plans					
10.8	Educational plans are specific, measurable, achievable, reasonable and time-bound					
10.9	The school has clear policies on standards, quality assurance and appraisal systems					
10.10	Effective leadership is enhanced by respect, trust and understanding between the senior management team and all the stakeholders					

## 11 School effectiveness in meeting its targets

		5	4	3	2	1
11.1	The school management team provides strong academic leadership to both educators and learners					
11.2	The school management team and educators had a high expectation for learners' performance					
11.3	Learners' progress is continuously assessed to ensure quality in educative teaching					
11.4	Educators are exposed to a developmental appraisal system in order to identify and close gaps in performance					
11.5	The school curriculum is relevant to the needs and interests of the school's clients					
11.6	Educators' training and development programmes are linked to the needs of educators and the schools					
11.7	There is constant feedback on performance and the stakeholders are informed about successes of the schools					
11.8	The school used a management information system to record pass or success rates					
11.9	The schools has a development plan that is based on the needs analysis of both the schools and the community					
11.10	The schools has a well developed plan to control and assure quality in teaching and learning, as well as to record areas to be improved					

Thank you for your time and assistance in completing this questionnaire.

#### Appendix 4: Checklist for school managers

Indicated by placing X in the appropriate block

	Yes	No
1. The school has a vision and mission statements		
2. Stakeholders participated in drawing up the vision of the school		
3. The school has a set of priorities		
4. Each priority has been turned into a set of targets		
5. There is a team leader for every target		
6. There is a specific task for every educator		
7. There are clear success criteria, both quantitative and qualitative, for each target		
8. Expectations and timeframes are clear and understandable		
9. It is clear to all involved that reports on the success of action plans should be presented to you.		
10. You are aware that you have to assist teams that did not meet their targets		
11. You have sufficient knowledge and skills to assist groups and teams to meet their targets		
12. You motivate teams to be successful in their work		
13. You use an appropriate appraisal system to give feedback to teams for their work		
14. You implement policies and rules impartially and justly		
15. You gather reports from groups to compile your school's progress reports.		

#### Appendix 5: Questions for a structured interview

In this section you are requested to give your opinion about the following questions. Your response to these questions would assist the researcher when drawing up a management and training programme for schools. You may provide reasons for your view.

- 1 Did you possess a management or leadership qualification by the time you were appointed to the management position you are occupying at your school?
  - 2 If your answer to 1 above is No: Do you think that a management or leadership qualification could have assisted you to be a better manager in your school? If your answer to 1 above is Yes: How did your qualification assist you in the management of your school?
  - 3 Are educators in your school motivated?
  - 4 What do you do to enhance staff morale and motivation in your school?
  - 5 Are there functional structures in your school?
  - 6 What do you do to empower structures in your school to function effectively?
  - 7 What should be done to assist you to make structures in your school to function effectively?
  - 8 Which strategies do you use for consulting stakeholders when changes are implemented in the school?
  - 9 Do you think that there is any need for you to change your approach for implementing changes in your school? Give reasons for your response.
  - 10 Is there a need to improve educators' teaching skills and professionalism on a continuous basis?
-