An overview of education management in South Africa

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I examine three main issues, which are directly linked to school management developments in South Africa since 1994: school leadership and management; professionalisation of principalship through the South African Standard for School Leadership (SASSL); and leading and managing the learning school. In exploring these issues I draw mainly on a systematic and comprehensive literature review of school leadership, management, and governance, commissioned by the Matthew Goniwe School of Leadership and Governance (MGSLG). The aim of the desk research was to establish 'what is known' and 'what still needs to be known' about educational leadership, management, and governance in South Africa. I also draw upon the work of the Education Management Task Team (EMTT), commissioned by the Directorate of Education Management and Governance Development in the National Department of Education. Their work drew upon the South African Schools Act (SASA) and, specifically, the recommendations of the Ministerial Task Team on Educational Management. The EMTT brief was to develop a policy framework for school leadership and management development, training and implementation, and to devise a South African Standard for School Leadership which would inform professional educational leadership programmes, leading to a National Professional Qualification for Principalship (SANPQP). The SASSL would provide a clear role description for principals, set out what is required of principals, and identify key areas of principalship.

Keywords: *learning schools; principalship; professionalisation, school leadership*

History and context

In South Africa,

> history has itself always been a site of political struggle, an effect multiplied by the fact that the country has often seemed like a vast social science experiment, a theatre in which much of the rest of the world finds echoes of its struggles (Johnson, 2004:preface).

The struggle facing the newly democratic South Africa was to overcome the legacy of the pre–*apartheid* and *apartheid* eras, segregationist social and education policies, which over many decades had manifested themselves in discriminatory laws and practices. Most of today's black teachers and school leaders began their teaching careers under the *apartheid* regime where they were required to practise in racially prescribed settings (Mattson & Harley, 2002:285). Also, while many white minorities were able to choose to live in particular communities, black, Indian and 'coloured' South Africans were required to live and work in areas prescribed by the Government under the Native Land Act of 1913, the Native Affairs Act of 1920, and the Native (Urban

Areas) Act of 1923 (Johnson, 2004:119). According to Johnson, these three Acts were the cornerstones of white supremacy and therefore black marginalisation in South Africa and they have had lasting effects on both educational and social infrastructure. These effects include ineffective leadership and management practices in many of our public schools, especially those in historically black areas.

In the new South Africa many daunting challenges are emerging and these raise questions about how the education of the young is best managed. For example, the sense of 'identity' between black and white South Africans has two powerful aspects, the historical in terms of the 'roots' of the individual, and the geographical, in terms of the concentration of people of similar groups within an area (Johnson, 2004:119). The sense of 'identity' of black and minority groups strongly influences their attitudes to teaching and leadership within schools (Soudien, 2002:275-277). At the level of the functioning of a school and the role and identity of the individual teacher, Tayeb (1998) alludes to a set of values that underline attitudes and actions of members of social groupings. Bhatt *et al.* (1988:150) argue that, "at all levels it is the white construction and interpretation of black reality that prevails" and this results in an alienating ethos where rules are not related to culture and where the use of diagnostic tools favours the English cultural heritage. In concert with this view, Mattson and Harley (2002:284) state that schools function primarily as signals of modernity on the African landscape. They

> display [w]estern symbols and advance modern expectations and promises because 'looking modern' brings affection from larger [w]estern states and spurs the arrival of foreign capital. And by signalling the coming of economic growth, real or illusionary, the fragile state strengthens its own domestic position.

They argue that this ideal is applied to South African education policy in transition; that entrenched western ideals (meant to ensure South Africa's competitiveness in a global information economy) are integrated with local ideals of social justice and democracy, on the assumption that, 'you can't have one without the other'. They also argue that policy in South African education tends to fall into the trap of social meliorism, where commitment to a vision of *what should be* clouds the ability to consider seriously *what is*, so that the good intentions of social reconstruction have more influence on the policy agenda than social and school realities.

Therefore, the education environment in South Africa points to diverse layers of complexity and paradoxes that have attracted the attention and interest of teachers, teacher trainers, scholars, and researchers world-wide. It is interesting to note the views of Carl Schmidst, a Grade 7 teacher at St James Primary, Cape Town, who, in an article entitled: '*Teaching is not for the faint-hearted*' says:

> *Our school draws most of its learners from the local communities and, more particularly, from the nearby overcrowded informal settlement. Many learners come from single-parent families are looked after by their grand-*

parents. Unemployment is high while others are employed as labourers or as domestic workers. Poverty levels are high. Evidence of this is seen in schools with the high number of learners being fed daily.

Schmidst points to numerous other problems facing schools in South Africa, including:

- Parents struggling to maintain sufficient contact with their children
- The high levels of HIV infection rates among learners in the schools
- Children who fail to complete homework or spend insufficient time studying for their tasks or tests
- Children able to afford only cheap foods especially chips (crisps) — saturated with salt and food colourants
- Problems of communication due to language barriers between the teachers and their learners.

These, and many other, factors in South Africa today, help to demonstrate the complexity of addressing the educational legacy of the past, including ineffective education systems, attitudes towards school principals and, specifically, education management practices. But the Department of Education, in its recent initiatives to address these problems, states clearly that,

> effective management and leadership, articulated with well-conceived, structured and planned needs-driven management and leadership development, is the key to transformation in South African education (DoE, 2004).

Overview of education leadership and management initiatives

I examine three main issues, which are directly linked to school management developments in South Africa since 1994:

1. School leadership and management;
2. Professionalisation of principalship through the South African Standard for School Leadership (SASSL); and
3. Leading and managing the learning school.

In exploring these issues I draw mainly on a systematic and comprehensive literature review of school leadership, management, and governance (Bush *et al.,* 2006), commissioned by the Matthew Goniwe School of Leadership and Governance (MGSLG). The aim of the desk research was to establish 'what is known' and 'what still needs to be known' about educational leadership, management, and governance in South Africa.

I also draw upon the work of the Education Management Task Team (EMTT) 2004–2006, which was commissioned by the Directorate of Education Management and Governance Development in the National Department of Education. Their work drew upon the South African Schools Act (SASA) 1996 and, specifically, the recommendations of the Ministerial Task Team on Educational Management (DoE 1996). The EMTT brief was to develop a policy framework for school leadership and management development, training, and implementation, and to devise a South African Standard for School Leadership (SASSL) which would inform professional educational leadership pro-

grammes, leading to a National Professional Qualification for Principalship (SANPQP). The SASSL would provide a clear role description for principals, set out what is required of principals, and identify key areas of principalship.

School leadership and management in South Africa
As noted earlier, a systematic review of the literature on school leadership, management, and governance was undertaken in 2005–2006. This part of the article is structured using the categories in the desk research report (Bush *et al.,* 2006).

Participation and democracy
Thurlow (2003) states that the shift to a democratic South Africa following decades of *apartheid* has been accompanied by a move to school-based management. He endorses the view expressed by the 1996 Ministerial Task Team (DoE, 1996:24) that self-management should be accompanied by internal devolution of power. Chisholm (1999) provides an assessment of school democracy based on a three-year longitudinal study immediately following the first democratic elections in 1994. She points to the 'control' model of management in the *apartheid* period, previously noted by Sebakwane (1997), but adds that teacher involvement in the former black schools remains low.

Bush (2003:54) reports on a 1998 survey of principals in KwaZulu-Natal: 75% of these respondents claim that they 'normally discuss with staff before a joint decision is taken' and that school aims are 'decided in consultation with all stakeholders'.

Gender
There is considerable evidence (Buckland & Thurlow, 1996; Bush & Heystek, 2006) that women are greatly under-represented in management positions. Sebakwane (1992) attributes this disparity to 'patriarchy'. To address the legacy of *apartheid* South Africa, many development and intervention initiatives have been implemented since 1994. For example, in 2006, the MGSLG established a course on Gender and Leadership: *Women in Education Management*, for which 50 female leaders are now registered. The course is offered alongside the Advanced Certificate in Education (ACE) programme of the University of Johannesburg.

Strategic management
The approach to strategic management in South African schools has been given added impetus by the shift to greater self-management and, in particular, the acquisition of Section 21 status (South African Schools Act 1996), which gives more autonomy to those schools obtaining this status. The greater the authority exerted by school management teams (SMTs) and school governing bodies (SGBs), the greater the potential for a truly strategic approach to emerge.

Thurlow (2003b) refers to the 1996 Ministerial Task Team Report (DoE,

1996:189) to argue that strategic management and planning represent a "radical culture shift for schools" that previously "focused on short-term tasks" and adopted a "culture of dependency". The new challenge is that the SMTs and SGBs are required to think and act strategically in order to align school policies and practices to national legislation. However, there is only limited empirical evidence of a strategic approach being adopted in practice.

Managing teaching and learning

There is limited material on the management of teaching and learning but there is a developing awareness of its significance for South African schools. Christie (2005), for example, asserts that learning is the central purpose of schooling and notes that it has four dimensions: student learning; teacher learning; organisational learning; and the principal as the 'lead learner'. She concludes that "leading learning is very complex and challenging".

Recent theoretical work on 'learning schools' has emphasised the importance of understanding that different definitions, models, and theories underpinning organisational learning exist and that none is widely accepted (Coetsee, 2003:6; Mitki, Shani & Meiri; 1997; Easterby-Smith, 1990; Fenwik, 1996; Garvin, 1999; Bierema & Berdish, 1996). The following three perspectives on 'learning schools' are of particular interest in the South African context.

The *normative perspective*, suggests that organisational learning only takes place under certain conditions (Coetsee, 2003:6). Work from Senge (1990) and Watkins and Marsick (1993) serve as examples in this regard. The *developmental perspective* views the learning organisation as representing a late stage of organisational development (Argyris & Schon, 1978). The *capability perspective* proposes that all organisations have the inherent ability to learn and that there are different ways an organisation can learn (Yeung, Ulrich, Nason & Von Glonow, 1999).

Furthermore, Kim (1998) and Schein (1997) see the learning school as increasing an organisation's capability to take effective action, while Dixon (1999) focuses on the intentional use of learning processes at the individual, group and system levels to ensure continuous transformation in the organisation so as to satisfy its stakeholders by turning knowledge into real value (McKenzie & Winkelen, 2004). Relatedly, Senge *et al.* (1996:3) observe that a learning organisation is a place where people continually expand their capacity to create the results they truly desire, where expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together. Pedler, Burgoyne and Boydell (1991) and Watkins and Marsick (1993) place emphasis on the facilitation of learning by all the members with the view to continuous transformation, while Garvin (1994) emphasises skill at creating, acquiring, and transferring knowledge and at modifying behaviour to reflect new knowledge and insights. Schein (1997) suggests a continuous strategic process and direction that is integrated with work and which results in changes in knowledge, beliefs, and

behaviours.

Although the theories and models presented above provide angles on how to construct learning organisations, in the context of South Africa, achieving the status of a learning school is difficult and complex, given the nature of the differing experiences of school leaders, teachers and learners. Jansen (2002: 121) argues that these experiences are mediated by the way teachers and learners understand and act on their value commitments, personal back-grounds, and professional interests in the context of change.

'Cross-boundary' leadership

Soudien (2002:274) asserts that people's histories condition the narratives they construct because of the complexity of working with the historical bag-gage of *apartheid* and its racialising effects. He claims that in his study of teacher professionalism there were:

> several moments when racial realities were naturalised into people's explanations, where people rendered their stories as if they were living in worlds which were structured naturally, as opposed to deliberately and in racial terms.

The author's study of 'cross-boundary' leaders, working across the divisive statutory frameworks mandated by the *apartheid* regime, shows many prob-lems arising from what are essentially different cultural perspectives (Bush & Moloi, 2006). Adams and Waghid (2003:19), for example, point out that the failure of 'cross-boundary' black leaders to function effectively 'as perceived' by their white colleagues could be a result of the 'social, and, in particular, economic conditions they come from', that are inextricably linked to realising the individual's purpose.

Booysen (2003:5) asserts that, because of the country's history, South African schools tend to shy away from emphasising cultural differences and tend to focus on assimilation and similarities. She argues that the first step in managing cultural diversity is to recognise and to value diversity. Only then can we learn how to deal with these differences and to build on the similari-ties and utilise the sameness. The exclusion, or marginalisation, of black leaders in the former Model C (white) schools in South Africa often surfaces in the form of conflict, condescension, superiority, disrespect, misunderstan-dings, prejudices, stereotyping, and inflexibility (Booysen, 2003:5). In line with this argument, Allard (2002) asserts that

> culture envelopes us so completely that we often do not realise that there are different ways of dealing with the world, that others may have a dif-ferent outlook on life, a different logic, a different way of responding to people and situations.

Financial management

Financial management is one of the most important responsibilities facing school principals since the implementation of the South African Schools Act 1996. Along with the principals, school governing bodies have wide-ranging

financial responsibilities, including school-level budgeting, managing devolved funding from provincial departments, setting school fees (subject to parental agreement), and raising additional funds to augment school budgets. A large-scale survey of principals in Gauteng province (Bush & Heystek, 2006) consistently demonstrated their anxiety about carrying out this function and their need for additional training to do so effectively.

Tikly and Mataboge (1997:160) examined the impact of reform on the former white schools and point to some of the financial implications of this process:

- The transfer of costs to parents and communities
- The linkage between learner enrolments and the allocation of real resources, notably teachers
- The decentralisation of financial management to school level
- The trend for wealthier schools to hire additional teachers paid for through the setting of higher fees by the school governing body (SGB).

Although legislation prevents the use of school fees to discriminate between learners, the learner profiles of certain schools seem to indicate that they are being used to limit access. This prompted research into equal access to education by Maile (2004) and Fleisch and Woolman (2004).

Human resource management

The dramatic changes in South Africa's educational landscape since 1994 have produced major challenges for school leaders and managers, notably in respect of human resource management. Bush and Heystek's (2006) survey of principals shows that this aspect was perceived as a major training need. Thurlow (2003c:15) shows that "school managers are expected to assume greater responsibility, under difficult circumstances, for the management of all those who work in their schools". Lumby (2003:161) argues that teacher motivation has been affected by the multiple education changes and by the "wretched physical conditions" in many schools. She adds that, "if motivation and morale are low, then teaching and learning suffer". Gilmour (2001:12) says that the process of retrenchment (redundancy) "places intolerable burdens on principals who have to oversee the process", while McLennan (2000) refers to its impact on teacher morale.

Managing external and community relations

The most important aspect of this category is the issue of de-segregation. Lemon (2004:269-289), for example, examines school inequalities in the Eastern Cape through research in 15 schools, ranging from those in wealthy suburbs to those in townships, rural areas, and informal settlements. He claims that national policies have been rich in the political symbolism of equity and redress but with "very limited implementation of change on the ground" . He concludes that 'class rather that race is now the main determinant of educational opportunity". Ngobesi (2005) notes that transformation seems to focus only on former white (Model C) schools while the fact that it should happen across all sectors of education is either ignored or perceived as irrelevant.

Fleisch and Woolman (2004) consider the impact of varying financial support for schools and argue that impoverished parents of learners wanting to attend well-funded schools lack the advocacy enjoyed by those parents more readily able to pay for schooling. Wilson's (2004) investigation concludes that differential state funding does not compensate adequately for the greater fee-earning potential of the richer schools.

Training and development

Van der Westhuizen *et al.*(2004), Makhokolo (1991), and Erasmus (1994), focus on the shortcomings of the training and development available to principals in the *apartheid* period and Tsukudu and Taylor (1995) conclude that the training available to principals in the early 1990s was inadequate. Mashinini and Smith (1995) take a similar view and point to the problems inherent in designing training for managers whose previous experience was fragmented by the separation of the four racial groups. Mestry and Grobler (2002:22) say that, "the training and development of principals can be considered as the strategically most important process necessary to transform education successfully".

The South African Standard for School Leadership

The National Department of Education has responded to this evident need for leadership preparation by developing a package of measures linked to the South African Standard for School Leadership (SASSL). The Department has acknowledged that:

> Existing management and leadership training has not been cost effective or efficient in building management and leadership capacity, skills and competencies for the transformation process or in enabling policies to impact significantly on the majority of schools' (DoE, October 2004).

To attempt to address this it has rooted the new professional development initiatives for principals and aspiring principals in its Policy Framework for Education Leadership and Management Development (DoE, October 2004). The Department has linked that policy framework to the South African Standard for School Leadership (SASSL) (DoE, August 2005), which clarifies exactly what the education system now expects of its principals. These documents are explicit in stating that school management and leadership are primarily about making sure that the teaching and learning process, as the main purpose of the school, is managed competently and effectively for the benefit of all learners. The Standard identifies six key areas of principalship:

• Leading and Managing the Learning School;
• Shaping the Direction and Development of the School;
• Assuring Quality and Securing Accountability;
• Developing and Empowering Self and Others;
• Managing the School as an Organisation;
• Working with and for the Community.

The new development strategy has two main elements:

1. An initial entry-level qualification for principals

This is set at the level of an Advanced Certificate in Education (ACE). The qualification has been developed by the Department of Education in collaboration with 14 universities, the unions, the Professional Association of Principals (SAPA), and a number of NGOs. The ACE will be used to train aspirant school principals and to upgrade the skills of those already in the post. The ACE is a vocational, professional management qualification; it is to be largely site-assessed and based to a large extent on proof of ability to apply the skills and knowledge in the participant's own school. The initial cohort will comprise 400 practising principals and this is expected to rise to 1500 candidates when the first group of aspiring principals is enrolled in 2009. The intention is to create a pool of trained school managers so that, by 2011, the Department of Education can make successful completion of this course a prerequisite for being short-listed for the post of principal.

2. Improved conditions of service of principals

Principals have been re-graded and their pay adjusted upwards to reflect the number of staff they manage (rather than the number of learners in their school). This is the first stage in identifying principals as a separate employment category, to be known as a 'Principal Management Service' or PMS.

The de-linking of principals' salaries and conditions from those of other teachers is intended to make it easier to reward them as well as to deploy them more flexibly. The intention is to professionalise this level of post and to ensure stronger accountability systems related to clear roles and responsibilities for principals and the performance of their institutions. There is also to be a defined career structure and precise conditions of service balanced with criteria against which to identify failing principals and have them removed.

The Department of Education (DoE, October 2004; August, 2005) has identified principals, as distinct from other school managers, as the main focus in the improvement of schools. The intention is to provide an overall package so that there is a concerted and systemic response to the professionalisation of principals linked to the improvement in their schools. According to the DoE, the result is a holistic and integrated approach, which, they claim, has broad-based support for the changes outlined in the two documents.

The Department of Education's starting point is that teaching and the management of a school are fundamentally different jobs requiring different skills. It asserts that it is imperative that a vocational professional development programme and qualification be introduced. This is to ensure that those who are employed as principals in government schools are fit for the job. Whether this approach, and the holistic package outlined, will be able to address the evident problems of school management and leadership poses a research question of critical importance.

Learner discipline

The issue of learner discipline is widely regarded as having its roots in the years of protest against the *apartheid* government. As Bush and Anderson (2003:95) note, "one of the 'weapons' of the black majority was for youngsters to 'strike' and demonstrate against the policies of the white government".

This made it difficult to establish a culture of teaching and learning (Bush & Anderson, 2003) and led to an emphasis on learners' rights (Enslin & Pendlebury, 2000). McLennan (2000:295) links these issues together in her study of schools in Gauteng: "Discipline and the lack of a culture of teaching and learning was another common issue … In township schools, there was a culture of entitlement which made (students) unwilling to do any work".

Mukhumo (2002), Pienaar (2003), and Porteus, Vally and Ruth (2002) claim that the 'burning issue' is the abolition of corporal punishment with no effective alternative measures provided to ensure classroom discipline. Most authors do not draw out the management implications of their research, but Harber and Trafford's (1999) study of a former white school in Durban shows how the institutional structures and organisational culture of the school were changed to improve communication and to involve pupils in democratic decision-making.

Teacher discipline and reliability

There is a general acceptance that teacher reliability and punctuality are problems that contribute to a weak culture of teaching and learning and are likely to impact negatively on learner attitudes and discipline. However, the evidence on which this assessment is based is largely anecdotal. While Jansen (2004), and Peacock and Rawson (2001), deal with aspects of teacher competence and professionalism, there are few sources that directly address the issue of teacher reliability, or consider management strategies for dealing with this problem.

Constructing a research agenda

Bush *et al.* (2006) say that their thematic review of the literature provides a starting point for the construction of a research agenda on school leadership and management in South Africa. The papers examined include many commentaries and literature reviews that help in constructing research questions but do not make a direct contribution to the body of research in this emerging field. The main research needs identified in the review are:
• Decision-making processes in schools, including the extent and nature of teacher participation and 'distributed leadership'
• The extent and nature of 'instructional' leadership in schools
• The management of budgeting, fee-setting, and real resources
• Human resource management, especially redeployment, and teacher morale and reliability
• School choice, 'transformation' and the management of learner admissions
• Managing relationships with parents

- The impact of leadership and management training and development on the performance of principals
- The management of learner discipline.

Bush *et al*. (2006:47) assert that most of the literature reviewed does not connect empirical research with theory to produce insights into school policy and practice. In particular, there are few references to the changing culture of schools following the partial transformation and partial desegregation of schools. Culture may be regarded as the most useful concept for interpreting school management in the new South Africa.

Conclusion

This article provides an overview of education leadership and management development initiatives within the context of the many daunting challenges, which South Africa has faced in transforming education from the segregated and divisive legacy of its apartheid past. These challenges require skilled leaders and the new ACE qualification is an explicit recognition that school principals cannot be expected to lead the transformation without specific and extended training.

I have also highlighted many important areas of school leadership and management practice and demonstrate the need for in-depth research to inform policies and practice at national, district, and school level, leading to the creation of 'grounded theory' to explain and interpret practice. South Africa needs detailed and empirical evidence on the effectiveness of its transformation policies and initiatives since 1994, and the impact of these upon all schools and learners, but especially those in historically disadvantaged areas.

It is clear that the Department of Education (DoE, October 2004, August 2005) intends to place the emphasis for transformation of all government schools on the professionalisation of existing and aspiring principals. In particular, the development of the new professional, vocational programme (ACE) is indicative of the Department's renewed commitment to more 'efficient and cost effective capacity building in leadership and management' to achieve its stated objectives: the fundamental one being,

> The advancement of effective teaching and learning — to build excellence throughout the South African system, rooted in the needs and the contextual realities of South African schools (DoE, October 2004).

Whether this objective will be achieved through the means identified by the Department of Education remains a critical area for research.

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