# HUMAN RESOURCES MANAGEMENT: A CONTEMPORARY MODEL FOR PRINCIPALS OF FREE STATE SCHOOLS

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# OF FREE STATE SCHOOLS

# DEDICATION

To Wilna, my wife and life partner, for
her love and support

SOLI DEO GLORIA

# DECLARATION

I declare that the thesis hereby submitted by me for the Ph.D. degree at the University of the Free State is my own, independent work and has not previously been submitted by me at another university. I further cede copyright of the thesis in favour of the University of the Free State.


Johan David Griesel


Date

# ACKNOWLEDGEMENTS

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# LIST OF ABBREVIATIONS

BCEA       -       Basic Conditions of Employment Act

DA         -       Developmental Appraisal

DAS        -       Developmental Appraisal System

DET        -       Department of Education and Training

DoE        -       Department of Education

DSG        -       Development Support Group

ELRC       -       Education Labour Relations Council

EMIS       -       Education Management Information Systems

FSDoE      -       Free State Department of Education

HoD        -       Head of Department

HR         -       Human resources

HRM        -       Human resources management

HRP        -       Human resources planning

IQMS       -       Integrated Quality Management System

LRA        -       Labour Relation Act

MBO        -       Management by Objectives

PA         -       Performance Appraisal

PAM        -       Personnel Administration Measures

PMDS       -       Performance Management Development System

PERSAL     -       Personnel and Salary

PGP        -       Professional (Personal) Growth Plan

PM         -       Performance Management

QWL        -       Quality of work life

RJP        -       Realistic job preview

SACE       -       South African Council of Educators

SAOU       -       Suid-Afrikaanse Onderwysunie

SDT        -       Staff Development Team

SGB        -       School Governing Body

SIP        -       School Improvement Plan

SMD        -       School Management Developer

SMT        -       School Management Team

USA        -       United States of America

WSE        -       Whole School Evaluation

# SUMMARY

The purpose of this study was to investigate the human resources management task of the school principal in the Free State Province. In order to achieve this goal, research was done regarding the human resources management task of school principals, which forms part of their complex overall management task.

The research entails a literature study to investigate human resources management in practice and also to focus on the functioning thereof in schools as a management task of the school principal. The human resources management task of the school principal and the various management areas which it covers were grouped under human resources provision and human resources maintenance.

In Chapter 2 human resources provision was discussed according to the following areas of management: human resources planning, recruitment, selection, placement, induction and career management. In Chapter 3 the maintenance of human resources was discussed according to the following areas of management: training and development, performance appraisal, compensation, motivation, quality of work life, leadership, groups, labour relations, health and safety, and administration.

Furthermore, an empirical investigation was undertaken to determine the way in which school principals approach and execute their human resources management task. In Chapter 4 frequency tables were utilised to obtain more information regarding the day-to-day management of human resources in schools by school principals. The continuation of the empirical research in Chapter 5 aimed at determining the training needs of school principals, as well as ascertaining the level of importance of specific human resources management tasks in the opinion of school principals. Various subgroups were identified beforehand and comparisons were made further to clarify the research. The empirical research undeniably proved that school principals have a definite training need with regard to human resources management and that they view these management tasks as highly significant as seen against the background of their total management task at school.

In Chapter 6 a model was drawn up with regard to human resources management based on the literature study and the empirical research. The goal of this model is to serve as a guideline for school principals in the execution of their management task with regard to human resources management.

In the final chapter certain findings were formulated regarding the human resources management task of school principals. Furthermore certain recommendations were made to illustrate to the Free State Department of Education that definite training needs exist which will empower school principals for their management tasks; and the attention of school principals was drawn to the importance of their management task with regard to the management of human resources in schools in order to realise the education and teaching goals of schools.

# OPSOMMING

Die doel van hierdie studie was om die menslikehulpbronnebestuurstaak van die skoolhoof in die Vrystaat Provinsie te ondersoek. Ten einde hierdie doel te bereik, is navorsing gedoen rakende die menslikehulpbronnebestuurstaak van die skoolhoof, wat deel vorm van sy/haar komplekse oorkoepelende bestuurstaak.

Die navorsing het bestaan uit 'n literatuurstudie om menslikehulpbronnebestuur in die praktyk te ondersoek en ook om die funksionering daarvan in skole as 'n bestuurstaak van die skoolhoof toe te lig. Die menslikehulpbronnebestuurstaak van die skoolhoof en die onderskeie bestuursareas waaruit dit bestaan, is gegroepeer onder menslikehulpbronnevoorsiening en menslikehulpbronneversorging.

In Hoofstuk 2 is menslikehulpbronnevoorsiening onder die volgende bestuursareas bespreek: menslikehulpbronnebeplanning, werwing, seleksie, plasing, induksie en loopbaanbestuur. In Hoofstuk 3 is die versorging van menslikehulpbronne bespreek na aanleiding van die volgende bestuursareas: opleiding en ontwikkeling, prestasie-beoordeling, vergoeding, motivering, kwaliteit van werkslewe, leierskap, groepe, arbeidsverhoudinge, gesondheid en veiligheid, en administrasie.

Verder is 'n empiriese ondersoek onderneem om te bepaal hoe skoolhoofde hul menslikehulpbronnebestuurstaak benader en uitvoer. In Hoofstuk 4 is hoofsaaklik deur middel van frekwensie tabelle gepoog om meer inligting te bekom rakende die dag-tot-dag bestuur van menslikehulpbronne in skole deur skoolhoofde.

Met die voortsetting van die empiriese navorsingsverloop in Hoofstuk 5 was die doel om die opleidingsbehoeftes van skoolhoofde met betrekking tot hul menslikehulpbronnebestuurstaak te bepaal en ook om die belangrikheid van bepaalde menslikehulpbronnebestuurstake in die oë van skoolhoofde vas te stel. Onderskeie sub-groepe is vooraf geïdentifiseer en onderlinge vergelykings is getref om die studie verder toe te lig. Die empiriese navorsingsverloop het onteenseglik bewys dat skoolhoofde 'n besliste opleidingsbehoefte het met betrekking tot menslikehulpbronnebestuur en dat hulle hierdie bestuurstake as baie belangrik teen die agtergrond van hul totale bestuurstaak in skoolverband beskou.

In Hoofstuk 6 is 'n model met betrekking tot menslikehulpbronnebestuur gegrond op die literatuurstudie en die empiriese navorsingsverloop saamgestel. Die doel van hierdie model is om as riglyn te dien vir skoolhoofde in die uitvoering van hul bestuurstaak met betrekking tot menslikehulpbronnebestuur.

In die laaste hoofstuk is bepaalde bevindinge rakende die menslikehulpbronnebestuurstaak van skoolhoofde geformuleer. Verder is sekere aanbevelings gedoen om die Vrystaatse Onderwysdepartement daarop te wys dat definitiewe opleidingsbehoeftes bestaan om skoolhoofde beter vir hul bestuurstaak toe te rus en skoolhoofde is attent gemaak op die belangrikheid van hul bestuurstaak met betrekking tot die bestuur van menslike hulpbronne in skole ten einde die opvoedings- en onderrigdoelwitte van skole te verwesenlik.

# KEY WORDS

- Education District
- Educator
- Free State Department of Education
- Free State Province
- Human resources
- Human resources maintenance
- Human resources management
- Human resources provision
- Importance of human resources management tasks
- Non-educator
- School
- School principal
- Training needs

# CHAPTER 1

# INTRODUCTION

## 1.1  DEFINING THE PROBLEM

The management task of the school principal has undergone dramatic changes. This evolutionary change in regard to the management task of the school principal is seen in the shifting of a pedagogic-didactical task to a more managerial approach (Van der Westhuizen, 1987:2). Whereas the school principal's most significant responsibilities used to be grounded in the academic sphere and related aspects like discipline, it is now clear that the duties of the school principal have become far more complex and extended. The school principal's role in ensuring the quality of education and teaching at school should never be disregarded (Cawood, Strydom & Van Loggerenberg, 1981:146).  Van der Westhuizen (1990:1-3) states that a school principal traditionally used to be a head teacher, and the task and the role of the school used to be simple and without complexity. Changes in education management in South Africa also resulted in the fact that school principals are not fully prepared for their task as school managers (Thurlow, 2003a:5). The task of the school principal has been transformed into a managerial one.  This has resulted in the role played by the school principal in society as well as the management of schools as businesses undergoing changes. A heavy burden rests on the school principal in the present South African education context to make a success of the school-based system of education management, which comes down to self-managed schools (Thurlow, 2003a:7).  It is especially applicable to newly appointed school principals who are professionally unprepared for their management task and where leadership skills are not developed or are lacking in managing crisis situations (McLennan & Thurlow, 2003:5-6).

According to Ubben, Hughes and Norris (2001:3) the management task of the school principal has changed from that of a reactive manager who had to maintain the status quo and give voice to policy requirements determined by a bureaucratic hierarchy, to that of the present-day school principal who has to ensure that schools become beacons of productive learning by utilizing leadership acumen. By means of the

dynamic humanness developed from an individual value system, a school principal must endeavour not only to change a school, but also to co-operate proactively with institutions both inside and outside a school. This is aimed at transforming it into a professional institution capable of excellent learning and teaching. School principalship is furthermore seen by Salley, McPherson and Baehr (1979:22) as one of the most durable and critical positions in the administration of American schools. This is also directly applicable to South African schools.

Van der Westhuizen (1990:47) describes four management tasks of the school principal, namely:
- Planning
- Organizing
- Guiding
- Controlling

Resulting from these management tasks, seven management areas are identified by Van der Westhuizen (1990:51). These management areas, which represent the management task of the school principal, are as follows:
- Staff affairs (human resources)
- Learner affairs
- Physical facilities
- Administrative management
- Financial affairs
- School-community relations
- Classroom management

A significant management task that is playing an increasingly important role in the daily routine of the school principal is Human Resources Management (HRM). Marx (1981:347-348) views HRM as a process whereby the provision, maintenance and development of staff occur in order to steer an organization in a particular direction to achieve the primary aims of the organization. This description of HRM is a very wide and general one, and it can be universally accepted that the process of HRM entails far more than simply the employment and rewarding of people, but rather specifically focuses on the effective utilisation of staff.

Bartol and Martin (1991:404) describe HRM as activities aimed at elevating the effectiveness of the workforce, thereby achieving the objectives of the organisation. Van der Westhuizen (1990:249) refers to HRM as the achievement of an organisation's primary goals by means of the provision, maintenance and development of staff. The school principal must therefore ensure that the school is managed properly in accordance with the applicable legislation and that regulations are complied with, including provisions for staff administration (Free State Department of Education, 2002a: s.a.).

HRM is a direct order of the Free State Department of Education (FSDoE) delegated to the school principal. This management task must therefore be administered according to policy. Unfortunately this is delegated by the FSDoE without proper induction of newly appointed school principals or even school principals that would need to manage this extensive responsibility after many years' experience.

The success of human endeavour is greatly influenced by the quality of the staff executing the tasks required in the achievement of the school's goal. People (staff) are also influenced by the physical and spiritual circumstances in which their tasks are executed (Castetter, 1971:3). Therefore organisations (schools) must realise the crucial role that human resources play in the well-being of the employer and employee (Sunday Times, (Careers) 15 March 2004:1). An accepted fact is that the objectives of the HRM should be in accordance with the aims of the organisation that it serves. The basic aim of any organisation is to prosper with all other aims stemming from this. In other words, should profit be necessary for survival, then profit is a goal. Should survival depend on growth, then growth, or more specifically profitable growth, will be a goal (Jones, 1972:1.3 - 1.4). HRM in education is, however, viewed as problematic and even inappropriate in a career where professional autonomy and collegial approaches with regard to decision making clash with the perception that educators should be managed, manipulated or viewed as a resource in achieving the goals of the school (Middlewood & Lumby, 1998:5). It is thus evident that the management of HR plays an indispensable role in the success of any organisation or institution. A school's most significant asset is definitely its staff and therefore the success or survival of a school can be directly connected to the management of the HR available

to the school. The role of the school principal as manager of the school and consequently HRM as management task of the school principal can therefore be viewed as an important aspect of school management. The philosophy of any HR manager has a considerable influence on the total process of HRM that can eventually determine the success of any organisation (Dessler, 1981:1). Therefore the school principal plays an extremely important role as the HR manager in the school set-up.

The staff of a school differs in terms of quality, quantity, training, experience, work expectations, assignments, temperament, skills, attitudes and values. The school principal also has a variety of tasks and responsibilities towards the staff of a school (Castetter, 1971:17 & 31). These tasks and responsibilities are, amongst others, the following:

- ensuring work satisfaction
- handling conflict
- communicating praise and censure
- providing supervision
- giving assignments
- promoting self-development
- providing emotional support
- implementing standards and criteria
- stimulating goal achievement (Castetter, 1991:31).

The above-mentioned HRM tasks can also be further extended to include aspects like planning, job analysis, recruitment, selection, induction, career planning, compensation, motivation, leadership, group functioning, labour relations, health and safety management, quality of work life (QWL) and administration (Gerber, Nel & Van Dyk, 1995:65 and Marx, 1993:355).

HRM therefore also forms a major subsystem of the total school system (Castetter, 1971:18). The complex HRM task of the school principal is described very accurately by Greenhalgh (1978:12) when he remarks: "Schools are unlike other places of employment."

The tertiary training of educators and even postgraduate study do not really prepare a person for taking up HRM with confidence and knowledge as part of the school principal's management responsibilities. The school principal often experiences frustration due to a lack of support from the Education Department i.e. the limited knowledge, experience and exposure of a School Management Developers. Therefore they are concerned about how developers will execute their duties efficiently. (cf. 4.3.4.39 & 4.3.4.40).

The HRM task of the school principal includes a very wide number of aspects and the complexities of the staff composition at a school must also be considered. The fact that a school's staff is made up of educators as well as non-educators is often not taken into consideration (cf. 2.3). These two categories can furthermore be divided into staff employed by the Education Department and staff employed by the School Governing Body (SGB). The management of each group has many similarities and many differences and this complicates the management task of the school principal. In addition, members of an SGB who perform some HRM duties in conjunction with the school principal, specifically the selection procedure, are not always trained and experienced enough to perform these duties, which results in the school principal having to assume these responsibilities as well.

The HRM task of the school principal must further be viewed against the established fact that labour is of prime importance for the success of any organisation and institution, as well as the fact that the production factor, labour, needs to be managed with great prudence. Labour as the life-giving production factor that has a definite influence on the use of the other production factors (i.e. capital, raw materials and equipment). It also seems to be one of the production factors that is the hardest to manage, as it cannot be successfully applied without a healthy team spirit.

It can therefore be stated that HRM aims at handling all staff concerns correctly and that the application of healthy management principles endeavours to bring about the best possible utilization of staff potential in order to aim at the achievement of the aims of the organisation (Marx, 1979:338-339). Todaro (1982:25 & 289) postulates that HR (human capital) determines economic growth in a country and plays a definite role in

the tempo of economic growth and social development. It is seen as an active ingredient of growth and development. It can be directly extended to a school, where the HR operating within a school determines the eventual success of the school in its role with regard to teaching and learning.

The school principal experiences great pressure in completing the enormous task as HR manager successfully. This task is further complicated by the human factor which the school principal must take into account. The success of the leadership position of the school principal and the eventual success of the school are then directly influenced by the staff of the school. The school principal must therefore attempt to use the staff within the school in order to achieve the goals of the school, without utilizing them like machines. The school principal must therefore never neglect to take into account that the human aspect of the task should always be the main objective (Griffiths, 1977:411). The new approach of education management in South Africa where the focus is placed on the self-managing school and where the school principal is the foundation on whom implementation and execution are dependent, also greatly influences the manner in which the management of people is understood and executed. After the 1994 election in South Africa the move has been away from an authoritarian management philosophy characterized by a top-down approach, to an approach where specifically educators are empowered in playing a bigger role in the management of their working life and actively participating in the decision-making processes within the school which influence them personally (Thurlow, 2003a:11).

The school principal clearly has a very complex task in managing the HR of a school in order to achieve the eventual goal of academic excellence. The achievement of the aims that eventually ensure the success of the school as organisation is dependent on the school principal's utilization of the HR available, as it also influences the other aspects of the management task of the school principal.

HRM is often viewed as being subjective to crisis management with the view point that there is a negation in taking control. This is not a prerequisite, because HRM is a necessary management element that can ensure success for any organisation (Desatnick, 1983:9).

From the preceding arguments the problem of this research seems to revolve around the following questions:

- What does HR provision and HR maintenance as the HRM task of school principals in the Free State Province entail?
- How is the HRM task of school principals performed in schools in the Free State Province?
- What are the training needs of school principals in the Free State Province with regard to HRM?
- What contribution can the implementation of an HRM model make in the daily HRM task of school principals in the Free State Province?
- Which recommendations can be made with regard to the HRM task of school principals in the Free State Province?

## 1.2  PURPOSE OF THE STUDY

By the end of this research the results will be:

- to determine what HR provisioning and HR maintenance as the HRM task of school principals in the Free State Province entails;
- to determine how the HRM task of school principals is performed in schools in the Free State Province;
- to establish the training needs of school principals in the Free State Province with regard to HRM;
- to recommend an HRM model to assist school principals in the Free State Province with regard to HRM;
- to make recommendations in regard to the HRM task of school principals in the Free State Province.

## 1.3  METHOD OF RESEARCH

Research is usually undertaken to handle a specific problem, describe, explain or improve a matter, or gather information in order to predict future contingencies so that policy can be formulated (Peil, 1982:3). Research is defined by McMillan and Schumacher (1989:8) as a systematic process during which data is collected and logically analysed for a specific purpose.

For the purposes of this study it will be endeavoured to research the school principal as HR manager and by means of the data collected to establish a model that could give guidelines to school principals regarding their HRM task. The following methods will be applied in this study to collect the specific information:

## 1.3.1 Literature study

A literature study in which primary and secondary resources are used, was undertaken to collect relevant information regarding:

- HRM as management task;
- HRM as described in litigation, circulars and Departmental publications as management task of school principals;
- HRM viewed as a management task forming part of the complex management task of school principals.

## 1.3.2  Empirical investigation

### 1.3.2.1  Goal

The empirical investigation into the HRM task of school principals in the Free State Province is aimed at ascertaining:

- how HRM is managed;
- if school principals fully understand their HRM task;
- the importance attached by school principals to their HRM task;
- if school principals have specific needs regarding HRM.

### 1.3.2.2  Instrument for data gathering

With reference to the literature study a questionnaire was drawn up to ascertain whether HRM is understood and implemented by school principals in schools in the Free State Province; to determine if HRM is viewed as an important management task and if school principals have specific training needs regarding HRM.

### 1.3.2.3  Pilot study

A pilot study was undertaken before the questionnaire was finalized in order to identify shortcomings in the questionnaire (N=6).

### 1.3.2.4  Universum

The universum or target population is school principals of public schools in the Free State Province, with the exclusion of school principals of farm schools and independent schools in the Free State Province. The target population consists of 919 school principals according to the Education Management Information System (EMIS) section of the FSDoE.

### 1.3.2.5  Sample

A random test sample of 500 school principals proportionally drawn from the five education districts is seen as sufficient for this study. The sample represents 54,55% of the target population.

### 1.3.2.6  Administration of the questionnaire

The questionnaire was also submitted to the FSDoE to apply for approval for dispatch to school principals. The questionnaire was dispatched by post to the sample of school principals.

### 1.3.2.7  Response rate

Of the 500 questionnaires dispatched, 331 were returned, representing a response rate of 66,2%. Of these 280 questionnaires could be utilized, which indicates a usable response rate of 56,0%. The 280 questionnaires used for the purpose of this study represent 30,5% of the target population, which is seen as representative.

### 1.3.2.8  Computation of data

Raw data was computerized by the Computer Centre of the University of the Free State and the Statistical Package for the Social Sciences (SPSS) Primer Programme was used to determine mean scores per education district and the Free State Province. Specific averages and frequencies were determined.

## 1.4    DIVISION OF CHAPTERS

The research report is rendered on the basis of the following division of chapters:

**Chapter 1:   Introduction**

**Chapter 2:   Human resources provision**

**Chapter 3:   Human resources maintenance**

**Chapter 4:** **Empirical research**

**Chapter 5:** **Analysis and interpretation of research results: training needs and importance of human resources management tasks**

**Chapter 6:** **A human resources management model**

**Chapter 7:** **Summary, conclusions and recommendations**

## 1.5 CONCLUSION

In this chapter an orientation was given regarding the research. The necessary evidence was given as to the reason why this study is important in clarifying the HRM task of school principals in order to establish a professional management cadre of school principals in the Free State Province.

In Chapter 2 HR provision as management task of the school principal will be investigated.

# CHAPTER 2

# HUMAN RESOURCES PROVISION

## 2.1  INTRODUCTION

In Chapter 1 reference has already been made to the complex nature of the management task of the school principal, with specific focus on HRM as management task. A literature study regarding HRM is, however, necessary in order to view the management task of the school principal in perspective. In this chapter HRM is defined and illustration is given in regard to the approach towards HRM and the relationship between HRM and organisational culture and structure, with a view to HRM in small and big organisations and the organisational structure in the Free State Department of Education. Thereafter reference will be made to an organisational structure that will serve as the basis for this literature study. Emphasis is especially placed on HR provision as a management task of the school principal. This represents the one leg of the HRM task of the school principal as set out in the organisational structure (cf. Figure 2.3). This investigation into HRM is done in the light of the complex background of the school principal's management task.

## 2.2  HUMAN RESOURCES MANAGEMENT (HRM) DEFINED

Farnham (1987:17) gives a very simple explanation of HRM as all activities undertaken by managers (school principals) in their dealings with employees. HRM is defined by Ferris, Barnum, Rosen, Holleran and Dulebohn (1996:1) as a scientific approach and practice inclusive of the employment relationship and all actions and aspects having to do with this relationship. Donnelly, Gibson and Ivancevich (1992:455) postulates that HRM is a process leading to the achievement of the objectives of the organisation by means of distinct organisational activities.  On the other hand, Bartol and Martin (1991:404) describes HRM as activities aimed at elevating the effectiveness of the workforce, thereby achieving the objectives of the organisation. These organisational activities, actions and aspects include the following in terms of human resources (employees):

- acquisition

- preservation

- termination of service

- training

- development

- proper application

- support

- compensation

- employee approach in regard to the achievement of organisational objectives (Donnelly, Gibson & Ivancevich, 1992:455; Griffen, 1990:346; Klatt, Murdick & Schuster, 1985:5 and Ferris, et al., 1996:2).

HRM can be seen as a strategic and coherent approach in regard to the management of the organisation's (school's) primary asset, employees, who individually or collectively contribute to the actualisation of the organisation's objectives (Armstrong, 1996:141). Van Zwoll (1964:3) postulates that HRM should be aimed at ensuring the effectiveness of the staff in order to achieve the goals of the school. McGregor (1991:337) agrees with this by viewing employees as a critical aspect of strategic thought which must revive the competitiveness of public and private organisations. HRM makes up part of the management process within an organisation. It aims at managing people within the work organisation and it is clear that employees are a critical factor in achieving a competitive advantage (Bratton, 1999a:11). HRM should therefore be aimed at developing individuals within an organisation in such a way that their personal needs in regard to their work are satisfied, ensuring that they are focused on the functioning of the organisation (school) (Dransfield, Howkins, Hudson & Davies, 1996:10).

The school principal's HRM task calls for exceptional people skills because employees who have not directly been appointed by the school principal have to be managed and the vast majority of these employees are professionals (Bell & Day, 1991:118). The school's functioning and the successful achievement of goals are directly influenced by the quality of staff who are fulfilling tasks within the school, but it also needs to be considered that the functioning of the staff within the school is influenced by their physical and emotional well-being (Kimbrough & Nunnery, 1983:60). The school

principal therefore has a great responsibility as HR manager to ensure the effective functioning of the school.

According to the South African Management Development Institute (2002a:125) HRM must therefore be focused on:

- the development of an HRM strategy in order to play a directive role in regard to HRM within the organisation and managing the goals of the key areas of HRM;
- developing and establishing tailored procedures and systems in regard to HRM;
- managing the administration of HRM within the organisation.

The definition of McGregor (1991:337) in terms of competitiveness addresses schools as public organisations. Schools compete with one another on many levels, but this competitiveness has also expanded to appointing the best educators at schools. HRM in reference to schools plays a very important role in the marketing of the school, and the school principal as HR manager must ensure that the staff has individual responsibility as to the marketing of the school, by enhancing the image of the school as an example to other schools via the completion of the daily tasks (Gray, 1991:33). The school principal fulfils a critical role in this instance in order to ensure that the school has a competitive advantage resulting from the functioning of the school's staff corps. Emphasis is thus placed on the staff as an important asset in the functioning of any school and therefore HRM plays an increasingly more critical role in educational management. The school principal is therefore in the best position as HR manager to develop the human resources available to the school in a changing educational environment in order to achieve the goals of the school (Breed, 2003:1). HRM can therefore be seen as a series of integrated decisions regarding the employment relationship, which has an eventual influence on the effectiveness of employees and eventually the organisation (school) (Milkovich & Boudreau, 1994:3).

## 2.3  HUMAN RESOURCES APPROACH

Mankind's actions are always at least partially based on basic assumptions made by them and this is specifically applicable to HRM. The relevant principle here is the

assumptions made of people. Dressler (1978:9-10) has listed these assumptions in the form of questions:

- Can people be trusted?
- Do people like working?
- Can people be creative?
- Why do people act the way they act?
- How must people be managed and handled?

The opinion held by management in regard to employees will therefore definitely influence management's approach towards HRM and eventually this approach directly influences the eventual success of the organisation with specific reference to the realisation of objectives (Dessler, 1981:7).

This approach represents the respect towards employees in the organisation, the role played by the employees in the total success of the organisation and how employees are to be handled and managed (Cascio, 1995:43). Management must have an optimistic view regarding their employees, which include that they are potentially creative, trustworthy, focused on working together voluntarily and that they have the potential for growth and achievement, as well as working together with others. Management must discover, use and apply these aspects (Beach, 1985:32).

The point of departure of the HRM approach in any organisation (school) is the consideration of the strategies of the organisation in order to bring about the realisation of the role that can be played by HR in formulating these strategies and ascertaining the level of motivation and development needed in the implementation of these strategies. The strategic aims of the organisation play a defining role in the people management of that organisation (Lumby, 2003a:23 & 29). The HRM approach of any organisation is aimed at an individual HRM approach rather than an HRM approach aimed at education in general. The emphasis is therefore not placed on the choice between various HRM approaches, but rather on an individual strategy that can accommodate the circumstances of each school.

Organisations can benefit dually by implementation of an HR approach. Firstly the organisation's effectiveness will be elevated and secondly the needs of the employees

are satisfied. Organisational goals and employee needs must therefore not be viewed as separate and exclusive aspects, but must rather be promoted as mutual and compatible without favouring one at the cost of the other (Carrell, Elbert, Hatfield, Grobler, Marx & Van der Schyf, 2000:10).

The philosophy of HRM is very closely connected to the definition given by Hersey and Blanchard (1982:3) whereby management can be viewed as a process of working with and through people and groups in order to achieve an organisation's objectives. Any organisation should therefore be focused on satisfying the needs of staff, in other words, to support staff and to serve and not vice versa. Organisations, including schools, and people (staff) need each other. Organisations need ideas, energy and talents, and people need careers, salaries and job opportunities. If good interaction exists within an organisation, both the organisation and the staff will benefit. If the staff are fulfilled in their career they will provide the organisation with the necessary talent and energy it requires. The approach within the organisation must be people-orientated to ensure successful achievement of goals.

According to Carrell, et al. (2000:10-11) the management of people as resources instead of a production factor, or as human beings whose actions are based on their emotions, will definitely lead to benefits for the organisations and the employee. This HR approach is illustrated in Figure 2.1.

**Figure 2.1: Human resources approach**



EMPLOYEE (SCHOOL STAFF)

Leads to

HIGHER
Employee Motivation
and Applied Ability

GREATER
Quality, Quantity or
Work

Leads to

Leads to

GREATER
Employee Rewards,
Recognition

HIGHER
Organisational
Productivity, Profits

Leads to

ORGANISATION (SCHOOL)
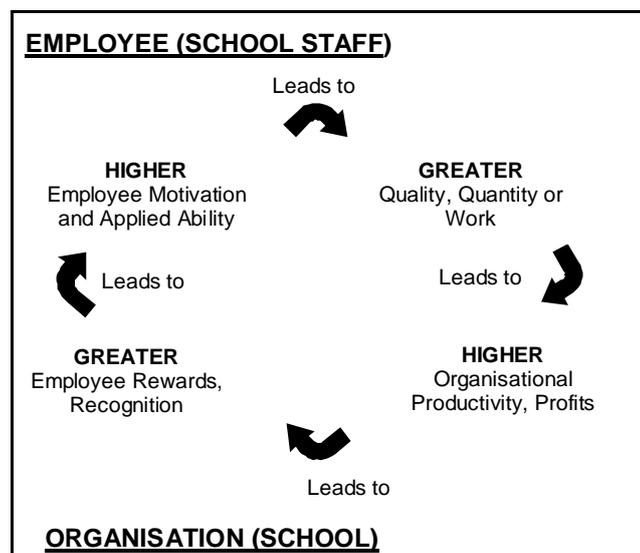
(Carrell, et al., 2000:11)

According to Carrell, et al. (2000:11), the basis of an HR approach vests in the following principles:

- Greater productivity as a long-term reward for the organisation is the result of an approach that the employees are an asset that must be managed and developed effectively.
- The implementation of policy, programmes and practices that will satisfy the economic and emotional needs of the employees.
- The development of working conditions which will encourage employees into developing their skills and applying these to the maximum.
- HR programmes and practices must be implemented that will reconcile the goals of employees and the organisation with each other.

According to Lumby (2003a:24) the characteristics of HRM approaches are as follows:

- Actions are set against the strategic objectives of the organisation as a whole.
- Emphasis is placed on the central role of the line manager.
- Individual action or intervention is recommended.
- Focus is placed on positive motivation as opposed to negative control.
- Processes are set in place in order to reach determined objectives in the place of procedures.
- It functions proactively rather than reactively.
- Complete integration with the daily management of the school.
- Purposeful negotiation and the resolution of potential conflict are actively practised between management and staff.

Dransfield, et al. (1996:81) approach HRM from two points of view, namely a hard and a soft approach. The hard approach in regard to HRM sees people as a vital resource, but views people in a different light than other resources. People are seen as vital, but they have to adjust to the needs of an organisation. The soft approach is more people-orientated and takes the view that people have to be nurtured, motivated and be made to feel important. People's feelings should be taken into consideration and they must be involved in the management of their tasks as well as informed and therefore be made aware of the goals and values of the organisation. School principals must see to

it that HRM as a soft approach is not just discussed, but it must be implemented and that people are not viewed and treated as other resources are viewed and treated.

Middlewood and Lumby (1998:7) emphasise the fact that people (staff) in educational institutions (schools) mean all adults working at the school, including, but not limited to educators. Therefore Bush and Middlewood (1997:ix) postulate that all people (staff) working at a school are entitled to the same effective and sensitive management. The challenge to the school principal in considering this is to view and to manage the existence and functioning of all categories of staff at his/her school on an equal basis.

Van Dyk (1995a:18) adds hereto that HR managers need to support other line and staff managers in the execution of tasks related to HRM. It is especially important where the school principal as HR manager needs to support deputy principals, heads of department (HoD's), grade managers, office managers, hostel matrons and school ground managers.  They need to be supplied with the necessary skills in terms of HRM to enable them to achieve their tasks and responsibilities.

Riches (1997:20-22) takes the view that the management of people should form an integrated totality with the management processes as seen in schools in general. This embraces all the core activities of school management by:
- planning the way in which goals will be achieved in the school;
- organising activities through the analysis of activities that need to be completed and the decision-making needed in achieving goals;
- commanding by means of leadership;
- coordinating activities aimed at goal achievement;
- evaluating the effectiveness of the above-mentioned management activities.

The school principal has an important task in directing the management of the school's staff through management action in such a way that it will lead to satisfied and happy staff and the achievement of the goals of the school. The management of any school is aimed at the establishment of goals for the school and connecting these to own objectives and those of the staff of the school. The management of people is

therefore the focus and there is a moving away from the approach where staff are motivated in giving direction to policy (Lumby, 2003a:24).

Middlewood and Lumby (1998:11) state that in England and Wales the increased focus in regard to the role played by staff in the organisational success of educational institutions has led to the fact that an effort has been made to enhance education and management performance by:

- creating better opportunities for entry to the teaching profession;
- strengthening support structures during the various stages of the careers of educators by using induction, mentoring and the development of professional and management skills;
- instituting appraisal systems;
- funding professional development activities;
- developing performance indicators;
- identifying similarities between compensation and performance;
- giving greater recognition to the role played by school support structures.

From the above-mentioned it is very clear that the HRM approach is aimed at people who must be organised in order to achieve a determined end goal. Although all resources within any organisation are important, the focus is kept on people within the organisation and not on money. The outcome of such an approach is transformed people management in South Africa. HRM in South African schools must be viewed against the background of limited individual alignment and freedom that prevailed in education. Changes that take place are, however, still very European-focused and this Western approach differs from the collective sense of solidarity or Ubuntu in South Africa. Emphasis should therefore be placed on an approach that can be made compatible with the African culture (Lumby, 2003a:19-20).

A people-orientated approach in regard to HRM by school principals will definitely greatly contribute to the achievement of the goals of the school as organisation, as the staff can identify with the goals of the school and the role played by each person in the achievement of these goals.

## 2.4 RELATIONSHIP BETWEEN HUMAN RESOURCES MANAGEMENT AND ORGANISATIONAL CULTURE AND STRUCTURE

### 2.4.1 Organisational Culture

Organisations have their own and unique culture established by those involved in the organisation. Every school has its own particular school culture. This culture is an invisible force in the school that motivates people into doing specific things in specific ways and at specific times. This influences the quality of work life of staff and learners. The school principal must be aware of the powerful and positive existence of the school culture and must ensure its continued existence in order to ensure the continuation of set guidelines and security in the workplace, thereby creating space for personal initiative and ingenuity (Basson, Van der Westhuizen & Niemann, 1990:648-649 & 653). Organisational culture is described as the manner in which all tasks in the school are undertaken and executed and where the willingness of the staff to dedicate themselves to the school is determined by the manner in which they identify with the organisational culture of the school (Theron, 1996:83&77).

Torrington (1987:553) states that the organisational culture of an organisation has an enormous influence on the behaviour of people who function within the organisation, with the establishment of specific norms that are later hard to change. Organisational culture indicates the intangible organisational character that exists amongst people in the organisation (Tyson, 1987:589). Certain behavioural patterns, meanings and rules of conduct for people within the organisation, are established by the organisational culture (Mathis & Jackson, 2000:42). The social and phenomenological uniqueness of a particular organisation is indicated by the organisational culture (Bush & Anderson, 2003:87). Organisational culture has a determining influence on the attitudes and work practices of educators (and learners), which in turn influence the culture of learning and teaching prevalent in the school (Kruger, 2003a:5). Organisational culture therefore has a great influence on the HRM task of the school principal, as it has such a defining role regarding the educators of the school, which determines the successful completion of the school's goals in regard to teaching and learning.

Organisational culture is described by De Villiers and Gous (1993:286-287) as an underlying system of values, habits, norms and attitudes that must be emulated by employees and management in an organisation. Van Dyk (1995b:53) sees it as the manner in which things are done in an organisation, indicating of the personality of the organisation. Lunenburg and Ornstein (1991:58) give the following description of organisational culture by referring to it as a shared ideological philosophy, beliefs, feelings, assumptions, expectations, attitudes, norms and values. Badenhorst (1997:344) describes school culture as a specific dimension of the organisational interaction with aspects making a contribution to the uniqueness and excellence of the school as an organisation. A specific spirit and belief are established within an organisation by the organisational culture, which determines the way in which people treat one another and the nature of working relationships (Ngcobo, 2003b:223). The characteristics of a school's organisational culture include the following:

- symbols
- language
- ideologies
- beliefs
- rituals
- myths
- norms
- values
- heroes
- ceremonies
- traditions (Badenhorst, 1997:344; Tyson,1987:589; Bush & Anderson, 2003:89 and Kruger & Steinman, 2003:19).

According to Bush (1998:32) an important task of a school principal is the shaping of aspects like rituals in the school. It surely also includes the other aspects of the organisational culture of the school. School principals therefore have the great task of causing a school culture to take root and thus establishing certain core values and beliefs within the school, which must be visible to external stakeholders. The school principal must therefore nurture the school culture (Bush & Anderson, 2003:97).

Managerial success is based on the interaction and the relationship between the primary organisational culture and HRM. If the employer and the employee regards success as the common goal of the organisation, it will ensure the dedication of the employees (Harrison, 1994:38). The organisational culture will be strengthened by the employee identifying it with and acting in line with the organisation's objectives (Rosenthal, Hill & Peccei, 2000:172). The shared goal will only actualise if HRM is integrated with the management strategy of the organisation. This determines the organisational culture within the organisation (Harrison, 1994:48). Harling (1989:20-21) sees organisational culture as networks of informal relationships and unofficial norms, which come to the fore with the interaction of individuals and groups within the framework of the formal structure within the school. The school principal must manage the influence of this mutual interaction very carefully, because it influences the level of performance and nature of the school principal as HR manager within the school.

The organisational culture is important to management, because it gives management an indication of how employees feel in regard to their work. It indicates general assumptions on how work is to be done, the relevant organisational objectives departmental and overall, and the personal objectives of the employees (Van Dyk, 1995b:54 and Van Dyk, 2001:61). School principals in South African schools are facing the unique challenge in managing the democratic education system. They have an enormous task as HR managers in developing an integrative school culture in order to manage staff and specific educators of different races to ensure teaching success. Many schools with a majority of black learners still have white educators, but the influence of educators who are Black, Coloured and Indian makes the HRM task of the school principal in South Africa very unique (Ngcobo, 2003b:222-223).

The establishment of an integrationist school culture with specific reference to staff is summarised by Ngcobo (2003b:230) and Bush and Anderson (2003:97) as follows:
- Document the school's history.
- Continuously revise school rituals that have become routine and with which only certain staff members identify.
- Acknowledge and honour heroes of all races.
- Utilise and develop the school's cultural values, like staff functions, which bring staff members closer together.

- A positive school culture can be created if the school principal can take note of all voices in the school, especially those who tend to draw others to themselves (whether positively or negatively) and incorporate these views.

Organisational climate also plays an important role in HRM within schools, because it determines the mutual collegiality and harmony among staff members, and with the school management who are responsible for HRM in the school (Sparks & Loucks-Horsley, 1990:244). Organisational climate is described by Janson (1996:92) as team spirit and social interaction amongst people. There is a mutual influencing between organisational culture and climate on each other with the traditions and ceremonies unique to organisational culture that have a great influence on organisational climate and vice versa where the attitudes of everyone in the school influence the organisational culture. School climate points at "good" schools where it is exciting to work and to learn and it indicates the social and cultural circumstances that influence the behaviour of the individual. The school climate can be compared to the personality of an individual (Lindelow & Mazzarella, 1983:169). Mentz (1996:102) postulates that school climate and school culture are synonymous because of the great overlap between the two.

Schools are traditional institutions and the school principal must utilize this school culture to make the HRM task easier. Shared goals are very important in ensuring successful teaching and achievement in a school and if the attitude of the staff towards the organisational functioning of the school is focused, the HRM task of the school principal becomes so much easier to handle. School principals as HR managers must enlighten themselves as to specific behaviour patterns and rituals present in the school, because the significance of the school staff is far greater than might be initially thought (Middlewood & Lumby, 1998:57).

## 2.4.2 Organisational Structure

The organisational structure indicates the formal relationship between the official roles filled by staff at schools. The purpose of the organisational structure is to achieve the goal of the organisation in an effective and purposeful manner. The main objective of the school is quality education. According to Middlewood and Lumby (1998:54-55), the functions of organisational structures include:

- ensuring economic and effective performance of the school;
- monitoring the work of individuals and teams;
- ensuring accountability of individuals and teams;
- promoting job satisfaction and opportunities for staff;
- coordinating various sections of the school regarding tasks to be executed;
- adjusting to change and changing circumstances;
- establishing effective communication and decision-making.

According to French (1994:75-76) the organisational structure that aims at focusing the activities and conduct of the employees on the desired goals of the organisation, entails the following formal arrangements:
- management systems that include procedures set in place to handle organisational activities like planning, goal setting and staffing;
- job design that comprises the division of tasks in groups to determine the manner of task completion and specific prescriptions thereof;
- the grouping of employees in an organisational hierarchy to facilitate the management of responsibility;
- the design, lay-out and physical arrangements within the workplace;
- standardised rules and regulations to regulate the conduct of employees within the organisation.

The organisational structure, according to Bush (2003:68), is determined by:
- the activities of the organisation (school);
- existing roles in regard to management positions;
- the level of motivation of the people within the school.

Organisational structure in schools can therefore be seen as a process which analyses, groups, creates, divides and controls the planned outcomes of the school. For the purposes of this study brief reference will be made to the different organisational structures:
- Line organisational structure represents authority vested in the school principal where instructions are given by the school principal and where staff give account to him/her with the authority stretching from the highest to the lowest level ("top-down approach").

- Line and staff organisational structure is an extension of the line organisation because experts can act in an advisory capacity in the line organisation and can also function indirectly without any authority within the line organisation.

- Functional organisational structure entails that the expert or advisor has the necessary authority to implement own decisions.

- Matrix organisational structure is closely related to the principles of participatory management where capable educators take responsibility for important tasks and form part of the formal authority structure within the organisation (Van Deventer, 2003c:110-115).

Organisational structure relates to the management style used in the organisation. It also indicates the way in which labour division within the organisation is implemented and how coordination within different tasks is achieved (Van Dyk, 1995b:55). This division of labour, which greatly influences the organisational structure must be subdivided so that it does not have a negative influence on the identity and coherence of the school as a professional organisation (Fowler, 1987a:33). The organisational structure must be closely related to the mission and management strategy of the organisation with the goal of structuring the organisational culture and structure in coherence with the corporate plan in such a way that this as a whole will function with HRM as a unit (Harrison, 1994:51). Therefore a formal pattern exists in regard to authority and official rules and procedures to be followed in achieving the goal of the organisation (Harling, 1989:20).

The creation of organisational structure in schools entails the grouping together of various tasks within the framework of posts in order to ensure that mutual objectives and goals are pursued within the functioning of the school. The school principal must manage the staff of the school in such a way that every individual is aware of his/her own task and responsibility (Barnard, 1990:429). It is of cardinal importance that the organisational structure of a school results in effective learning systems and that can only happen if the staff of the school can differ and if criticism, reflection and

assessment are encouraged (Duignan, 1994:85). Regarding the forming and functioning of the school's organisational structure as a formal organisation (Firestone & Seashore Louis, 1999:312), the school principal must offer staff the opportunity for self actualisation, initiative and enjoyable expression of their daily task.

The organisational structure that regulates the formal pattern of relationships amongst people in schools provides people with clarity that can also be comforting during times of change. In South African schools the organisational structure is made up of a pyramid where school principals, deputy principals and HODs are placed opposite to other educators and non-educators. The formal organisational structures in South African schools, which are mostly arranged by the DoE and the provincial department of education, are, however, supplemented by creating informal and unpaid management positions within the official framework of schools. The challenge for school principals is found in combining these unofficial and official management positions into a management strategy (Bush, 2003:82).

The organisational structures within schools in South Africa must move away from a public administrative approach, which was rule-based, secretive, with a hierarchical management structure and an authoritarian and non-consultative management style. The top-down management structures in schools to which school principals and educators are subjected is a regulated, instruction-giving Departmental structure. This must create the opportunity for school principals to establish a unique organisational structure within schools which will then lead to greater democratisation in the establishment of organisational structure within schools (Thurlow, 2003b:43).

The school principal must always consider the fact that the organisational structure of the school is influenced by the capability of those individuals who make up the staff of the school and the preferences of the school principal. Therefore every school must have an own, unique organisational structure in order to fulfil the needs of the school and the individuals comprising the school (Bush, 1997:47).

## 2.5 HUMAN RESOURCES MANAGEMENT IN SMALL AND LARGE ORGANISATIONS

### 2.5.1 HRM in small organisations

Smaller organisations do not have an independent HR department at their disposal and the senior manager or a delegated person then manages the HRM in the organisation. Heads of department can also manage this management task as a delegated responsibility (Marx, 1979:340). In many instances HRM in smaller organisations shows a more informal nature with the presupposition that, should employees do the work, everything is in order (Harrison, 1994:120).

HRM is neglected in many instances and there is usually no official policy or procedures. Problems experienced include registers that are not kept up to date, appointment procedures that are not uniform and the possible absence of motivation as development principle (Marx, 1979:340-341). Schools fall in this section with the school principal fulfilling the role as HR manager.

### 2.5.2 HRM in large organisations

In large organisations HRM is managed by an independent HR department, with an HR manager in charge, supported by heads of department. The HRM is usually placed on the same level as other managerial functions in order to ensure a healthy HRM (Marx, 1979:341-342).

## 2.6 ORGANISATIONAL STRUCTURE OF FREE STATE DEPARTMENT OF EDUCATION: HUMAN RESOURCES DIRECTORATE

### 2.6.1 Overall organisational human resources management structure

The FSDoE's human resources management directorate is managed in accordance with a suggested organisational structure (Free State Department of Education, s.a. f: 1-4).

**Figure 2.2:    Free State Department of Education: Proposed organisational structure for HR Directorate**
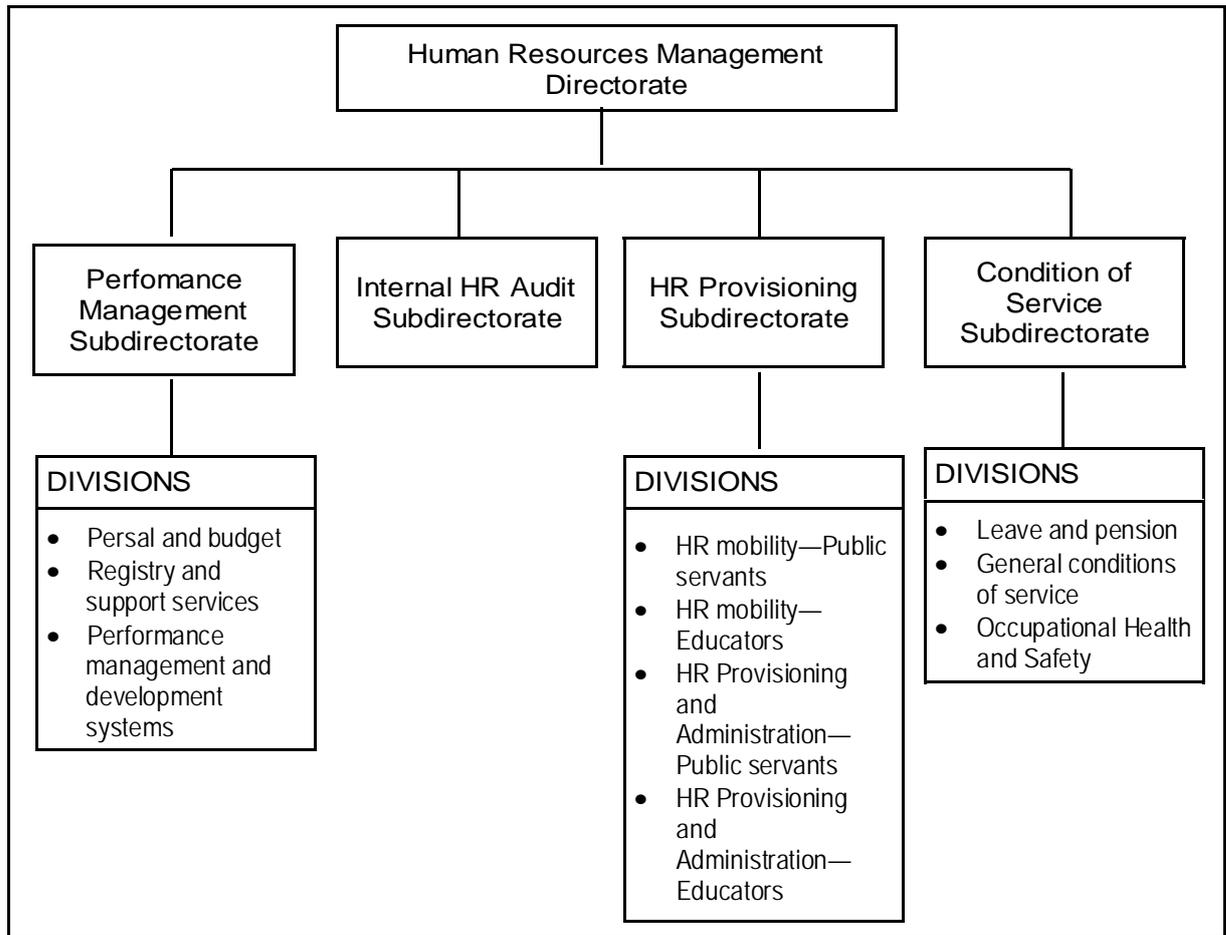


(Free State Department of Education, s.a. f: 1-4)

## 2.6.2   Human Resources Management Directorate

### 2.6.2.1 Purpose

The purpose of the HRM directorate as overall function is to supply HRM services in the FSDoE which will include the monitoring and coordinating of HRM in the various Districts (Free State Department of Education, s.a. f:1).

### 2.6.2.2 Functions

The functions of the HR directorate, according to the Free State Department of Education (s.a. f:1). are as follows:

- Satisfy the HR needs of the FSDoE.
- Administration of conditions of service.
- Undertake HR audits.

- Maintenance and implementation of performance management and development system in FSDoE.

The HR Directorate therefore consists of four sub directorates, each comprising of various divisions. This is illustrated in Figure 2.2.

## 2.7 ORGANISATIONAL STRUCTURE OF THE HUMAN RESOURCES MANAGEMENT TASK OF THE SCHOOL PRINCIPAL

The following organisational structure (cf. Figure 2.3) is compiled to give structure to the literary study regarding the complicated HRM task of the school principal, as HRM and management task in itself is not fully described in literature. For the exposition Gerber, et al. (1995:65) and Marx (1993:355) were used as guidelines. According to Marx (1993:355) HRM is divided into two sections, namely personnel provision and personnel maintenance. For the purpose of this study these two aspects will be referred to as human resources provision and human resources maintenance.

**Figure 2.3: Human resources management for school principals**
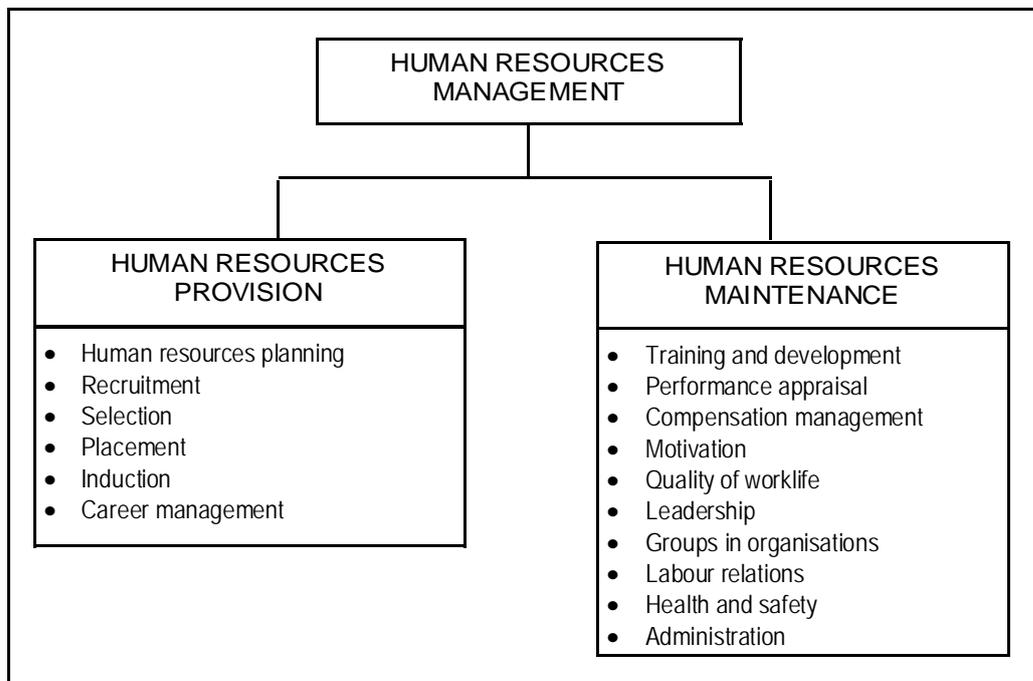


(Gerber, et al., 1995:65 and Marx, 1993:355).

Human resources management is a complex management task of the school principal and the following literature study will be used to view this management task in perspective with regard to HRM in practice. Investigation will now be made as to the human resources provision.

## 2.8  HUMAN RESOURCES PROVISION

The successful existence of any organisation is determined by the measure to which suitable candidates can be obtained to fill vacancies (Gerber, 1995a:83). Human resources provision is seen by Marx (1993:355) as a continuous process starting with human resources planning (HRP) and ending with induction (cf. Figure 2.3), while Gerber, et al. (1995:65) includes career management.

### 2.8.1  Human resources planning

#### 2.8.1.1  Introduction and definitions

Human resources planning (HRP) ensures that the correct number and type of people are available to utilise the skills necessary to actualise the strategic business plans of the organisation (Rothwell & Kazanas, 1994:11). The matching of business needs in terms of HR over the long and short term, as well as the future application of employees is addressed by HRP, thus ensuring smooth development within the organisation (Armstrong, 1996:405 and Rebore, 1998:26). HRP therefore aims at fulfilling the needs of the school in regard to present and future HR needs. If the school principal wants to complete the HRM task in the school successfully, the need for staff must be properly and accurately identified. Forecasting of available staff must be done to determine which additions and replacements are needed to ensure staff of acceptable quantity and quality in reaching the goals of the school (Lunenburg & Ornstern, 1991:457).

Dransfield, et al. (1996:91-92) describe HRP as the acquisition, application and development of HR in reaching the goals of the organisation. Grobler, et al. (2002:5) define HRP as a systematic process during which HR requirements are to be revised so as to ensure that the correct number of staff with the required skills are available when needed. The simple definition of Gerber (1995a:96) concurs with this, describing

HRP as the correct number of employees, available at the right time and place suited to the needs of the organisation.

Systematic forward estimation that makes up part of HRP aims at managing the organisation's future supply and demand for labour in order to ensure the actualisation of objectives and makes it possible for the organisation to implement better planning in regard to recruitment, selection, training, career planning and other HR activities (Marx, 1993:355-356 and Werther & Davis, 1989:92). The purpose of HRP in schools is viewed by Castetter (1971:83) as the process involved in developing and maintaining a highly motivated, competent school staff in order to achieve the goals of the school.

HRP forms the cornerstone for HR provision and plays an important role in the long and short term planning in terms of staff needs of schools, which influence Education Districts' curriculum functions and physical planning processes (Marx, 1993:356 and Rebore, 1991:13).

**2.8.1.2 Objectives of Human Resources Planning in schools**

Castetter (1971:84) describes the objectives of Human Resources Planning (HRP) in schools as follows:
- developing long and short term plans to ensure that schools are effectively staffed;
- determining HR priorities;
- coordinating HRP with the total planning of the school;
- developing and maintaining information systems regarding the HR status of the school;
- compiling training programmes to provide in the HR needs of the school;
- identifying problems in regard to HR provision and functioning;
- assessing the goal achievement of the school in regard to HRM;
- ensuring long and short term budget planning and management;
- establishing the focus needed in realising school policy;
- identifying the nature of work and performance standards needed to achieve the school's objectives;
- drawing up an analysis of the successful application of existing staff;

- providing information regarding HR needs preceding employment;

- putting existing HR imbalances or those which may arise into perspective;

- revising the applicability of staff deployment in the school;

- determining the influence of collective bargaining;

- visualising the influence of organisational changes within the school set-up;

- providing the opportunity to formulate comprehensive objectives for school programmes;

- ensuring that HRP keeps track with changes in social, political, economical and educational circumstances.


### 2.8.1.3 Human Resources Planning process

The HRP process is portrayed in Figure 2.4.


**Figure 2.4: Steps in the workforce planning process**
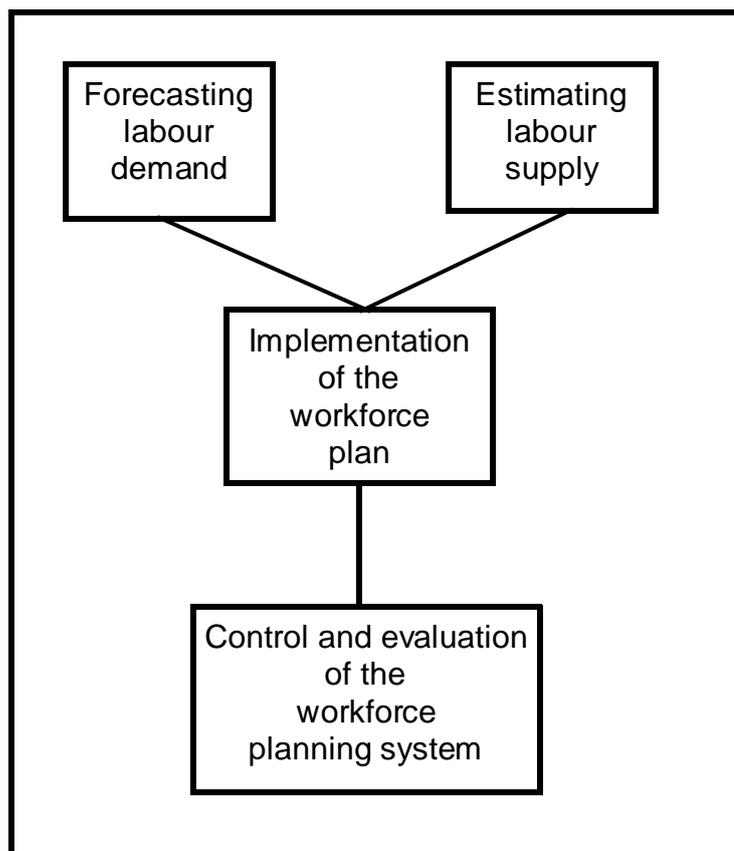


(Schultz, 2001b:222-223)

The steps in the HRP process as shown in Figure 2.4 are further expounded as follows:

- **Forecasting labour demand**

This entails the number of workers needed in the future in the organisation (Schultz, 2001b:222).

- **Estimating labour supply**

A manpower audit can be used in determining the organisation's present condition regarding labour supply in order to determine the availability of employees possessing the required skills, thus fulfilling the future needs of the organisation. This can comprise present employees (internal labour market) or those outside the organisation (external labour market) (Bramham, 1987:60 and Schultz, 2001b:223).

Forecasting labour demand and estimating labour supply are directly influenced by the labour market (cf. 2.8.8.4).

- **Implementation of the workforce plan**

The results of the labour demand forecast and the labour supply estimation determine further action which can be summarised as follows:

> labour demand exceeds labour supply which can lead to training or retraining, succession planning, promotion from within, recruitment from outside, subcontracting, temporary workers and overtime;

> labour supply exceeds labour demand where the following can be utilised: pay cuts, reduced hours, work sharing, voluntary early retirements, inducements to resign and layoffs;

> labour demand equals labour supply with the result that replacement of resignations from inside or outside and internal transfers as well as redeployment can take place (Schultz, 2001b:223-224).

This workforce plan can serve as a future roadmap to ensure that employees can be identified for future employment and that it can be ascertained when they are going to be needed and if they are likely to need any further training (Mathis & Jackson, 2000:50). School principals are faced with a great challenge in this regard, especially

taking into consideration the uncertainty regarding the filling of vacant posts, temporary and excess educators, as well as an annually adjusted staff provision that needs to be managed (Volksblad, 10 Desember 2003:7).

- **Control and evaluation of the workforce planning system**

Exercising control and continuous evaluation of HRP can identify irregularities or deviations so that the necessary action can be taken (Schultz, 2001b:223-224).

## 2.8.1.4 Factors influencing Human Resources Planning

Many factors influence HRP. These factors are shown in Figure 2.5.

**Figure 2.5  Factors that influence HRP**
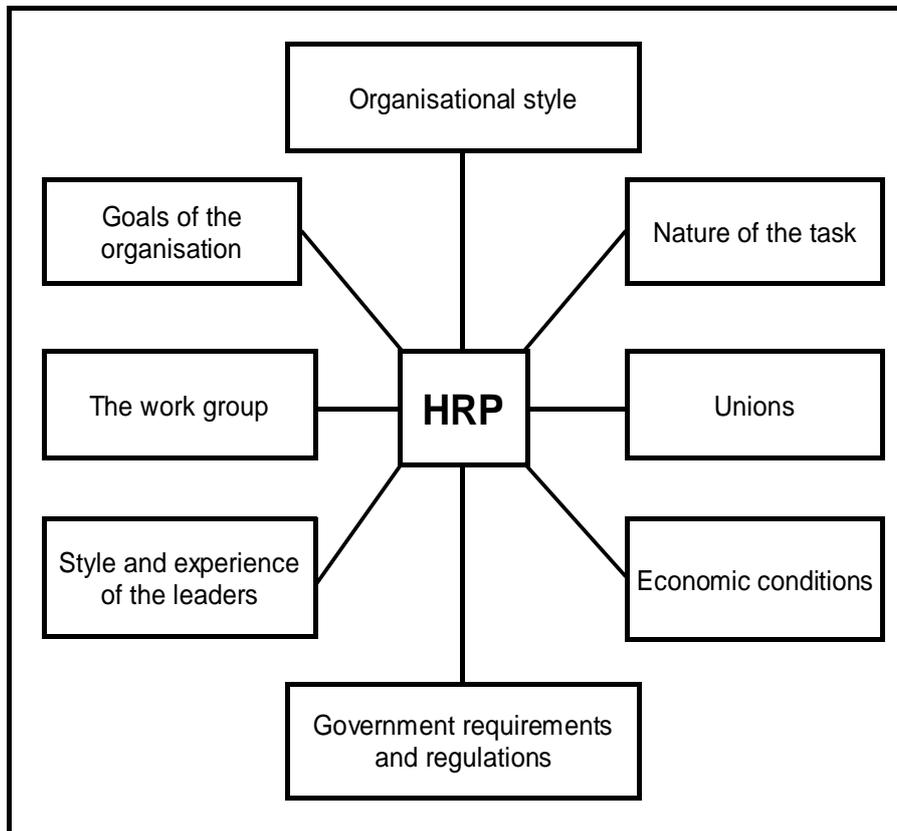


(Schultz, 2001b:221)

The factors as shown in Figure 2.5 can be internally or externally influencing factors and these are viewed as follows by Schultz (2001b:220-222):

- **Internal factors influencing HRP**

  - ➢ **Goals of the organisation**

  HRP enables any organisation to react quickly in regard to changing circumstances. These changes, which can include expansion, diversification and downsizing, have definite results as to the goals of the organisation (school).

  - ➢ **Organisational style**

  The nature and the functioning of any organisation in regard to style of functionality and organisational culture will be defining as far as the employment of specific persons and certain characteristics are concerned.

  - ➢ **Nature of the task**

  The type of task is linked to a specific type of organisation like a school. The compilation and requirements of the tasks within the organisation are determined by the organisational style.

  - ➢ **Work group**

  Teamwork (groups) plays an important role in the functioning of schools.  HRP is influenced extensively by group dynamics if individuals are replaced, as well as by the mutual interaction amongst groups.

  - ➢ **Style and experience of leaders**

  The management style, characteristics and experience of a school principal can determine job satisfaction or dissatisfaction amongst employees, which can have a great influence on labour turnover, either negatively or positively, which will, in turn, directly influence HRP.

- **External factors influencing HRP**

  - ➢ **Unions**

  The long-term planning of any organisation can be extensively impacted by the intervention of unions wanting to participate in a transparent process in order to protect their members.

➢ **Government requirements and regulations**

Strategies concerning HRP are influenced by legislation and regulations, for instance the functioning and regulations of the Skills Development Act and the Employment Equity Act.

➢ **Economic conditions**

The labour market that may have a surplus or a shortage of people with specific skills may have a major influence on HRP, as well as the economic climate of the country, which influences the financial capabilities of the employer. This also includes government departments like Education.

Subsequently the following aspects that influence HRP and have points of contact with HRP are investigated: HR forecasting, job analysis, which includes job description, job specification and legal constraints (cf. Figure 2.6).

**Figure 2.6:   Human Resource Planning**
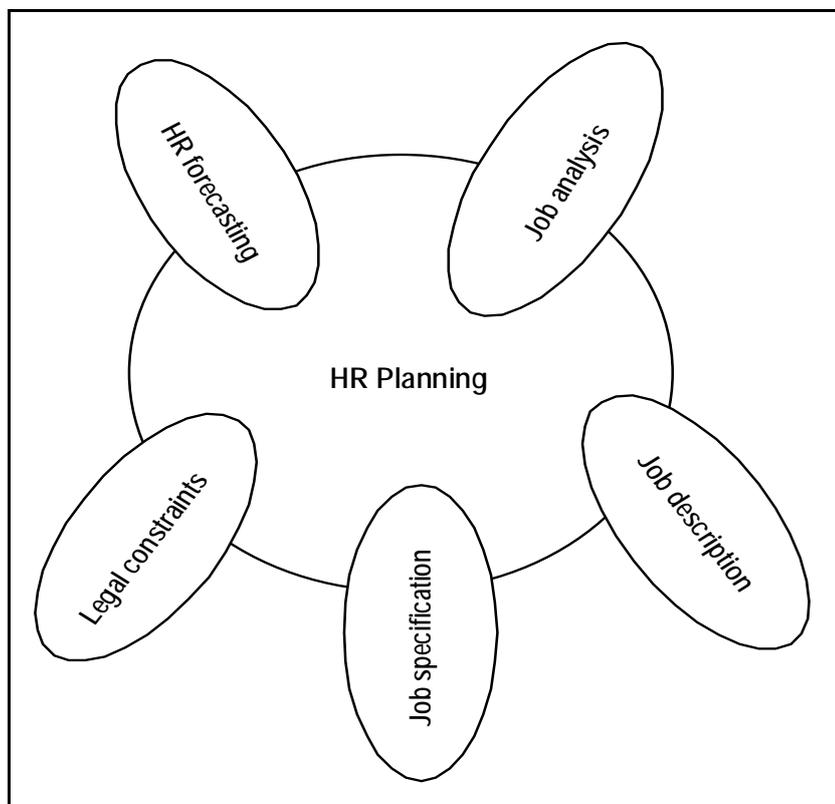


(Lunenburg & Ornstein, 1991:458)

### 2.8.2 Human Resources Forecasting

#### 2.8.2.1 Human Resources Forecasting as management task

Information obtained from scanning the external labour environment and the assessment of internal weaknesses and strengths of an organisation are used to predict the HR supply and demand aimed at organisational objectives and strategies (Mathis & Jackson, 2000:59). HR forecasting determines the future demand of employees with specific skills, and estimates the supply of employees by using information of the past and the future to identify future circumstances (Gerber, 1995a:101 and Mathis & Jackson, 2000:59). An important aspect of HR forecasting is the need for employees necessary to fulfil specific tasks or functions so that future directed decisions can be taken (Deckard & Lessey, 1980:16).

#### 2.8.2.2 Quantitative and qualitative approaches

HR forecasting is an art rather than a science (Sherman & Bohlander, 1992:144). At an organisational level HR forecasting is subject to many variables and therefore sophisticated techniques do not always have user value because it is hard to adjust these to changing circumstances and they are not always pliable (Rowland, London, Ferris & Sherman, 1980a:15). Two approaches in regard to HR forecasting are described by Sherman and Bohlander (1992:144), namely the quantitative and qualitative approaches.

- **Quantitative approach**

The Quantitative approach is also known as the top-down approach and utilises statistical or mathematical techniques.

- **Qualitative approach**

The bottom-up approach also known as the qualitative approach is less statistical in nature and endeavours to integrate interests, abilities and aspirations of individual employees with future and present needs of the organisation.

#### 2.8.2.3 Human Resources Forecasting by Free State Department of Education

HR forecasting by the FSDoE is undertaken by the Education Management Information System (EMIS), which uses a quantitative approach. A graphic representation of projected learner totals is portrayed in Figure 2.7.

**Figure 2.7:   Free State Education: Possible projected learner totals 2002 – 2006**

FREE STATE EDUCATION: POSSIBLE PROJECTED LEARNER
TOTALS 2002 - 2006
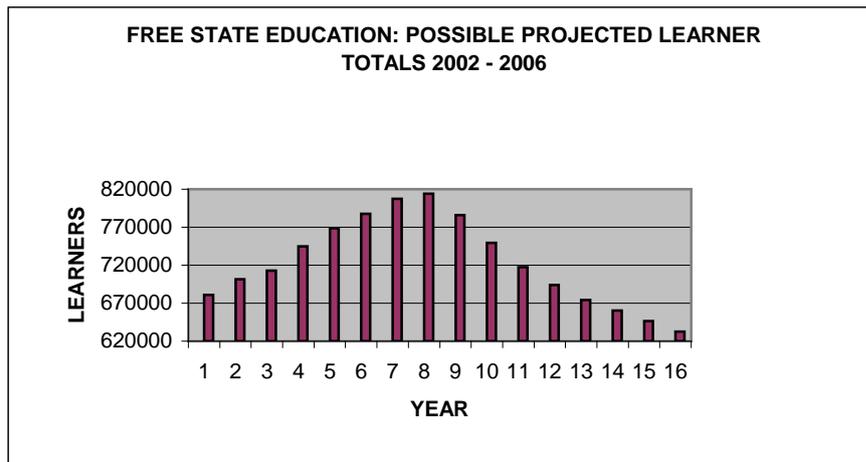


 (Free State Department of Education, 2003a:s.a.).

EMIS does forward estimations by using the present trends (Kok, Personal interview, 6 March 2003). The forward estimations are important as post allocations to schools are made based on this information.

### 2.8.2.4   Schools and HR forecasting

Schools are not involved in the forecasting done by the FSDoE, but they have started doing their own distinctive processes specifically aimed at scarce subjects. An example of this is the action of Jim Fouché High School in Bloemfontein (Jim Fouché High School, 2000:s.a.).

In 1999 this school noticed that there would be a lack of Natural Science educators and therefore they identified a student intending to study in Natural Science. They allocated a bursary to this student with the understanding that the student would, on completion of his studies, accept a SGB post at Jim Fouché High School. This post could later be converted into a Departmental post. The process was completed and Mr L. van der Merwe is at present still part of the school staff (Van Wyk, Personal interview, 6 March 2003).

## 2.8.3   Job analysis

### 2.8.3.1   Introduction and definition

The success of HR provision is determined by the information available regarding every job in the organisation, because every job has its own demands and

responsibilities and therefore every job should be analysed (Marx, 1993:357). Job analysis should therefore be undertaken to determine the content of each job by means of the collection and evaluation of all available information (Bratton, 1999c:248). It can be based on four questions:

- what does every person do?
- how is it done?
- why is it done?
- skills needed to do it? (Van Zwoll, 1964:41).

Bartol and Martin (1991:407) describe job analysis as a systematic collection and recording of information that describes the goal of the job, duties, circumstances in which the job is to be done, cooperation with others, as well as knowledge, skills and abilities needed to complete the job.

This entails a process of logical and systematic research into the components of a job (De Belder & Message, 1974:218). Crane (1979:93) summarizes the description of job analysis as the identification and description of the perceptible characteristics of a job and the requirements needed in order to execute the job successfully. According to Marx (1993:357) the characteristics of the person filling the post are very important to job analysis. Traditional job analysis describes how the job was done in the past, while future directed job analysis enables decision-makers to determine speculatively how work would possibly be done or how the organisation would want the job to be done (Rothwell & Kazanas, 1994:140).

### 2.8.3.2 Process of job analysis

Schultz (2001a:198-200) describes the process of job analysis using nine steps.

- **Involve and empower employees**

Job analysis must be done in deliberation with employees. For example: employees should be aware of the reasons for observation in the working environment, otherwise the employees might view the process with mistrust. A representative job analysis committee, made up of unions, representatives of departments of the organisation, professional bodies and HR societies can facilitate this process.

- **Place of jobs in the organisational structure**

The existing organisational chart will indicate the position of all jobs in the organisational structure.

- **Reason for conducting job analysis**

Job analysis should be undertaken with a specific goal in mind. The goal can be restructuring, training and development, compensation structures or a combination of the aforementioned.

- **Decide on job(s) to be analysed**

The cost and time involved in job analysis normally lead to a sample of jobs to be analysed.

- **Methods of data collection**

The method or combination of methods depends on whether the job analysis is job-orientated, worker-orientated or a combination of these two. Various methods can be applied in collecting information. One method or a combination of methods can be used (Dessler, 1981:73). Methods should not be used in isolation, but rather complementary (Rebore, 1991:101).

The following methods and techniques can be used to collect information:
- Individual interviews and/or group interviews with jobholders
- Questionnaires
- Direct observation
- Record-keeping by employees regarding their task or written reports
- Reports by supervisors
- Consultation with jobholders
- Own records of the organisation
- Research and studies undertaken
- Job performance by using repetitive jobs (Moore, 1972:5.3; Crane, 1979:92; Dessler, 1981:73-76; Bartol & Martin, 1991:407; De Belder & Message, 1974:218; Dunn & Stephens, 1972:49; Rebore, 1991:100-101; Schultz, 2001a:200-202 and Rebore, 1998:103).

- **Collection of job information**

Information is collected according to the chosen method. This information should be objective, factual and comparable to the analysis of other jobs.

- **Process job information into job description and job specification**

Information collected is processed and used to compile job descriptions and job specifications.

- **Design or redesigning of jobs**

The comparison of job descriptions and job specifications with revised documentation could lead to the design of a new job should the differences be marked, or to the redesign of the job should the differences be slight.

- **Review and update the process**

The value of this exercise must be evaluated and the necessary changes must be done.

### 2.8.3.3 Uses of job analysis

The most important uses of job analysis are covered in Figure 2.8.

### Figure 2.8: Major uses of job analysis
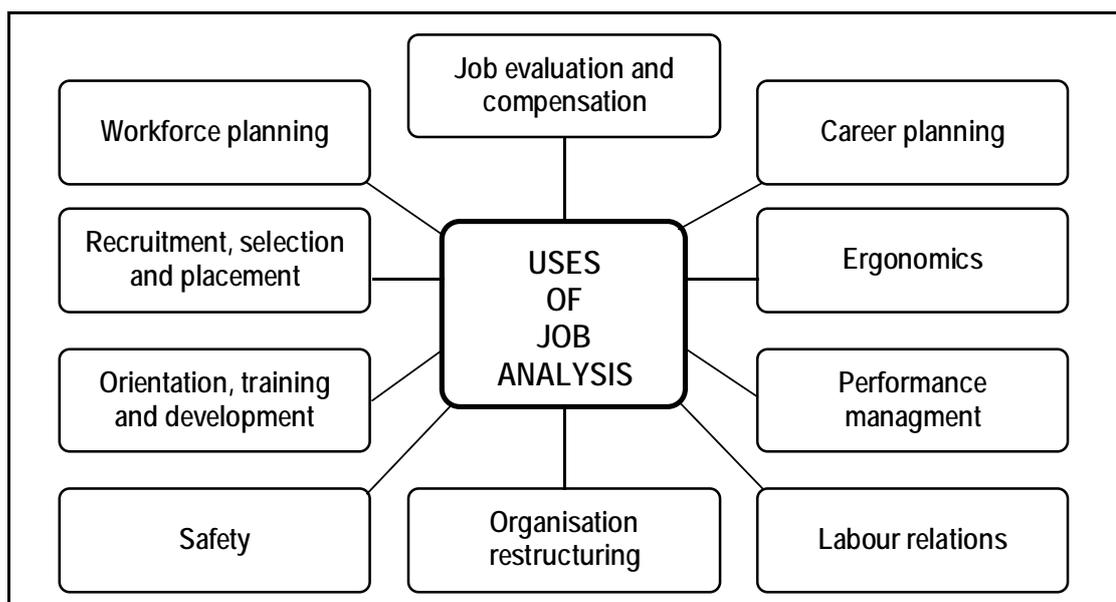


(Schultz, 2001a:197)

With reference to Figure 2.8 the major uses of job analysis can be described as follows:

- **Workforce planning** – job analysis forms the basis of the forecasting of present and future HR needs.

- **Job evaluation and compensation** – the value of jobs for the organisation can only be determined with proper job descriptions and job specifications (Schultz, 2001a:197). In the Free State Province the goal of the job evaluation strategy is the implementation of a job evaluation system for the Free State Provincial Government. Job evaluation comprises a process of systematic analysis of jobs to determine their relative value to the organisation. Job analysis is seen as job evaluation for the purpose of this strategy. Job evaluation is aimed at the setting up of a satisfactory and equitable basis for the determination and management of internal relativities and for the design of grade and salary structures. The focus is on the job and its demands and not on the characteristics or performance of the jobholder. The qualitative and not the quantitative features of the job is the point of departure of job evaluation (Free State Province, s.a. c:3-4).

- **Recruitment, selection and placement** – by means of job analysis, it can be undertaken with a great measure of success in the following HR activities: duties, tasks and responsibilities of the job, job expectations and skills, abilities and knowledge needed to do the job.

- **Orientation, training and development** – successful training is not possible if the tasks and operations for the successful completion of the job are not available. Job descriptions and specifications must be up to date, which will ensure that training programmes reflect real job requirements.

- **Performance management** – work standards that can be determined by means of job analysis give employees the opportunity to bring their level of performance in line with work standards. This also provides managers

(school principals) the opportunity to develop, address and maintain subordinates' performance effectively.

- **Career planning** – because the requirements connected to posts are available through job analysis, it is possible to determine individual career paths for employees.

- **Ergonomics** – job analysis can play a supporting role in designing jobs and workplaces, which will lead to more efficient performance.

- **Safety** – dangerous situations in the workplace and in the execution of jobs can be indicated by means of job analysis.

- **Organisational restructuring** – job analysis can play a determining role in arranging and rearranging jobs within any organisation, which are regular occurrences in education, for instance downsizing, de-layering, de-craiting and retrenching, as well as redeployment.

- **Labour relations** – the role played by job analysis in ensuring that the organisation meets the requirements set by legislation and the realities of present labour practices, is of the utmost importance (Schultz, 2001a:197-198)

The school principal should never overlook the great role played by job analysis in successful HRM. It can be a valuable contribution in making the school principal a successful HR manager and school manager.

## 2.8.4  Job description

### 2.8.4.1  Definition

Job description is a written description of a job (Sherman & Bohlander, 1992:119), which concentrates on the post itself and contains information regarding duties and responsibilities (Marx, 1993:357). Over and above the duties and responsibilities, it also entails working conditions and the use of equipment, tools and material (Griffen, 1990:352). Job description is therefore a record of the key characteristics of a specific

job (Dransfield, et al., 1996:136). Stokes (1987a:76) describes it very simply as a description and definition of a particular role within an organisation.

### 2.8.4.2 Aim and purpose

The goal of job description is to clarify the nature of the job, so that the job can be described more accurately and be demarcated or entitled. In this manner everything involved in the execution of the specific job can be classified (Van Zwoll, 1964:43). It can indicate very clearly who is responsible for the functioning of what in the school (Bell, 1992:43). It does not, however, play a major role in indicating mutual relationships between jobs or tasks, with the exclusive focus on the nature of the tasks of the individual job or task (Hentschke, 1975:258). Professionally appropriate job descriptions can be very valuable in helping the individual identify himself/herself with the organisational principles and priorities of the school. A job description can further play a role in serving as a personal mission statement in a specific context so that priorities can be clearly defined and it can lead to personal autonomy from which a capacity to act may result. It can take the role or the personalisation of the language of the school's values and priorities as it can be applied in any given context.  A job description is a way of bringing together the personal with the organisational.  This should be unique, but may include certain generic statements like:

- leadership of the school so that the whole community is affected by learning;
- leading a subject team in the implementation of the academic policy of the school;
- professional leadership to facilitate staff development by means of coaching and mentoring;
- leadership in the classroom to ensure individual learning and improved achievement (West-Burnham, 1998b:113).

### 2.8.4.3 Developing a job description

According to Schultz (2001a:207-208) a job description is made up of identification information, job summary and responsibilities.

- **Identification information**

This part of the job description includes the following:

➢ job title

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- ➢ location of the job (e.g. department, section)
- ➢ reporting structure
- ➢ compiler of job description
- ➢ date of job analysis
- ➢ verification (the authorised job description)

- • **Job summary**

The job summary is a concisely written exposition, which is a precise summary of the purpose of the job.

- • **Job duties and responsibilities**

This part of the job description must be comprehensive and accurate because it has an influence on the total job description. Job duties and responsibilities provide an exposition of what is to be done, how it is to be done and why it is to be done (Schultz, 2001a:207-208).

### 2.8.4.4  Job description in the Free State Department of Education

The FSDoE has brought out a job description workbook (Free State Department of Education, s.a. a: 1-16) as well as a job description document (Free State Department of Education, s.a. b: 1-6) in order to facilitate job description in the FSDoE. In the job description workbook the aspects seen by the FSDoE as necessary for effective job description are described as follows:

- • **Job information summary**

The first section of the job description identifies the job and it is used for general administrative and recording purposes. Biographical data is indicated in this section.

- • **Job purpose**

The reason for the existence of the post is put forward accurately and concisely. The unique value of the job for the organisation is determined and the job placed in perspective within the organisation with focus provided.

- • **Dimensions of the job**

In this section the position of the job in the organisational composition is indicated, using an organisational chart. Reporting by the job holder and also who reports to the

job holder is dealt with in this section. Management responsibility in terms of the number of staff and budgets is also handled here.

> This entails the specific outcomes of the job, in other words, what should be achieved by means of the job. This spells out the "what" and "why" of the job and not the detailed "how". Aspects applicable here include leadership, communication, financial planning and management, strategic planning and transformation, policy, research and development, curriculum delivery and staff development and management.

> The outputs are deduced from the key responsibilities and could include products, services, conditions, information or decisions. The roles represent clusters of outputs and describes the key areas of the job because jobs are no longer limited to one role. This is not the same as job title, but could sometimes concur therewith.

> Here the various people with whom the jobholder will come into contact with, both inside and outside the organisation, are described and indicating the type of communication and the aim of this contact, with the emphasis on the necessity of retaining the contact.

> This is the physical working conditions wherein most of the work will be done, as well as any physical aspects to which the jobholder will be subjected with a description of working hours and exposure to extraordinary circumstances.

> Materials and equipment to be used in the execution of duties are described here.

- **Career possibilities**

Information regarding the next post level in skills required will be described in this section, although the jobholder does not have to wait for this, but may go ahead with applications for other jobs.

- **Competency profile**

Skills, knowledge, values, attitudes and abilities that are critically important for the achievement of key outputs are focused on in this section.

- **Job agreement**

The job agreement is a critical component in the compilation of the job description and includes an agreement between the supervisor and employee and the content of the job description, as well as agreement and discussion on the meaning of the content (Free State Department of Education, s.a. a:1-16). The document compiled from the job description action is completed by the jobholder (Free State Department of Education, s.a. b:1-6).

## 2.8.5   Job specification

Job specification entails the requirements set to the jobholder in order to complete the job successfully (Marx, 1993:357). Job specification is not a separate document, but is usually mentioned in the concluding section of the job description (Sherman & Bohlander, 1992:119). Two areas are covered by job description, namely the skills which the employee should have and physical demands set by the job to the jobholder (Chruden & Sherman, 1984:88). In other words, it describes the human attributes needed for the job (Dransfield, et al., 1996:137) and is it described by Bell (1992:113) as person specification, which actually comprises a part of job specification.

## 2.8.6   Job design and redesign

### 2.8.6.1   Job design defined

Job design is described by Sherman and Bohlander (1992:124) as the structuring of jobs aimed at improving the organisation's effectiveness and establishing employee satisfaction. This comes down to the organisation of tasks, duties and responsibilities in a productive work unit (Mathis & Jackson, 2000:653). De Bruyn (1995:229) explains job design as a process during which work and tasks are described with the achievement of individual and organisational objectives as the point of departure. Effective job design can enhance performance in the organisation and can even greatly influence the QWL of employees, which includes aspects like job satisfaction,

employee health, personal relationships at work, absenteeism and labour turnover (Robertson, 1987:156).

### 2.8.6.2 Job redesign defined

Marx (1993:375) describes job redesign as a change in the employee's job to make it more pleasant, challenging and cheaper, taking minimum standards into consideration. The employee's routine is interrupted and this could decrease frustrations in the work situation. Job redesign plays a very important role in the enhancement of work motivation. It includes the following:

- measurement of employee perception of the task attributes in terms of skill variety, task identity, significance, autonomy and feedback;
- association of the abovementioned perceptions with relevant outcomes like motivation;
- investigation of certain hypothesized moderating variables (Furukawa, 1994:53).

### 2.8.6.3 Approaches to job design

The following basic approaches to job design could be followed:

- **Job simplification**

A task is divided into smaller units in order to give lower skilled and paid employees the opportunity to be able to complete these smaller tasks (Gerber, 1995a:84). Job specialization as described by Marx (1993:374) could lead to overspecialisation, which could lead to boredom, unnecessary mistakes and frustration. Job simplification leads to reduction of the content and scope of the job with simultaneous reduction in the variety of skills, task identification, autonomy and the minimisation of feedback (De Bruyn, 1995:230).

- **Job enlargement**

Job enlargement is the opposite of job simplification (Marx, 1993:375 and Gerber, 1995a:84). This entails the addition of similar activities to an existing job done by the individual and amounts to a lengthening of the job cycle (Marx, 1993:375). Through job enlargement, boring and routine tasks are replaced by interesting and challenging tasks (Hanson, 1979:86). Job enlargement is also known as horizontal loading (Marx,

1993:375 and Sherman & Bohlander, 1992:127). Erasmus and Van der Westhuizen (1996:208) as well as Kruger (2003c:251) view job enlargement as the change of the scope of the job to such a degree that the educator performs a greater variety of tasks that doesn't necessarily make the job more interesting.

- **Job enrichment**

Through job enrichment the employee obtains more responsibility by greater control and freedom in a specific job. Job enrichment could also help prevent boredom, frustration, unnecessary mistakes and a high level of labour turnover by motivating employees (Marx, 1993:374). In the field of education teaching posts could be upgraded in terms of responsibility, scope, importance and challenges. It should be kept in mind that everyone is not interested in more enriching jobs and that enrichment possibilities would not be attractive to everyone (Sergiovanni & Carver, 1980:123-124). According to Marx (1993:374) job enrichment is also known as vertical loading because the employees now do their own planning and take control of responsibilities. By means of job enrichment new skills can be obtained and this provides the opportunity for development, challenges and a sense of achievement with valid learning having taken place (West-Burnham, 1998a:78). Job enrichment initiatives are very important in schools because they promote the QWL of educators (Erasmus & Van der Westhuizen, 1996:208). Job enrichment in schools can be attributed to job enrichment of Post Level 1 educators (entry level educators) where they are appointed as grade managers, learning area managers or are in charge of sport or cultural activities (Kruger, 2003c:251-252).

- **Job rotation**

By job rotation is meant that employees perform tasks on rotation (Gerber, 1995a:84). In other words, the tasks stay the same and the employee moves from one task to the next (Marx, 1993:375). Job rotation lessens monotony and boredom and unpleasant tasks can be spread out so that employees can obtain various skills and abilities (Gerber, 1995a:84). The result of overspecialisation can be intercepted by job rotation (Marx, 1993:375). This could be utilized very effectively with non-educators, whereby terrain staff and hostel staff could be rotated with reference to specific tasks, seeing that they perform routine tasks. This could broaden their experience as well.

### 2.8.7  Legal constraints

Legislation implemented to regulate employment practices greatly influences nearly all levels of employment, which also includes Human resource planning. School principals must always ensure that all employment decisions are indemnified from accusations of, amongst others, racial discrimination, colour, gender, national origin, age or disability (Lunenburg & Ornstein, 1991:462). Although the School Governing Body is responsible for some employment practices at schools, the school principal also has an important role to play, because many of the problems, accusations and queries will eventually be referred to the school principal.

Legal aspects and restraints are very complex matters and for the purposes of this study brief reference will be made to affirmative action and a few laws that could have an influence on the school principal.

### 2.8.7.1  Affirmative action

Rebore (1998:39) describes affirmative action programmes as result-orientated programmes implemented in good faith in accordance with equal opportunity clauses with reference to relevant legislation.  Affirmative action is therefore not a law as such, but rather specific objectives that need to be pursued in conjunction with legislation. It therefore means that affirmative action in itself cannot be contravened, but a specific law or laws can be contravened. The big difference between South Africa and the USA is that the majority of the population is entrenched by means of affirmative action in South Africa, whereas minorities are entrenched in the USA. In education, in South Africa, affirmative action entails therefore action taken to advance actively previously disadvantaged groups in education and in schools (Van Deventer, 2003e:282).

The policy of the FSDoE in regard to affirmative action is to ensure a representative and equitable staff that will support the historically disadvantaged and empower them to reach their maximum potential (Free State Department of Education, 2001c:29). In the filling of teaching posts SGB's must take affirmative action measures into consideration for designated groups, namely Blacks (which include Indians, Coloureds and Africans), women and disabled applicants (Free State Department of Education, 2004a:5). Coursen and Mazzarella (1983:38) state that affirmative action in the USA schools must prevent that "black" children feel that "Blacks" are excluded from

positions of authority if all posts are filled by Whites. In South Africa this principle can also be of great importance in schools.

The FSDoE's HR plan in regard to representative targets with reference to race, gender and disability is shown in Table 2.1.

**Table 2.1:   Representativity targets**

| Designated group | Representative targets |
|---|---|
| Blacks | 86% |
| Whites | 14% |
| Male | 55% |
| Female | 45% |
| Disability | 2% |

(Free State Department of Education, 2004a: s.a.)

Affirmative action must be calculated by school principals in the management of HR. Although staff appointment is an SGB function, school principals play a leading role in the functioning of SGB's.

### 2.8.7.2  Legislation

**(a)   The South African Constitution Act, 108 of 1996**

The South African Constitution represents the broad principles and policy that regulate civil society across the whole South Africa (Butterworths Labour Relations Training Library, 2000a:15). The Constitution is therefore the supreme authority of the country and all laws are subordinate to the Constitution (Breed, 2003:11). Fabbriciani (2003:3) states that the Constitution ensures that Education underwrites basic human rights for individuals and society within acceptable labour practices.

**(b)   Labour Relations Act, 66 of 1995 as amended (LRA)**

Fabbriciani (2003:4) states that, "Labour Law regulates the Employment relationship between the employer and the employee, to enable them to reach mutual goals and to achieve maximum individual development and job satisfaction". This Law makes

provision for mechanisms and structures that manage the relationship between employers and employees and also settle disputes (Butterworths Labour Relations Training Library, 2000a:15).

The purpose of the LRA is to ensure economic development, social justice, labour peace and democratisation of the workplace and to establish the fundamental rights of employers and employees as described by Section 23 of the Constitution. The relationship between employers and employees as described by the LRA does not distinguish between employment practices in the private or public sector (Nel, 2001c:103). The employment relationship is a legal relationship based on a service contract of employment (Fabbriciani, 2003:4). This implies that the employment relationship in regard to School Governing Body appointments in schools needs to be carefully managed in line with the LRA.

According to Fabbriciani (2003:4) the LRA has the following influence on Education:

- Employment in Education is regulated by conditions of employment and contracting and other collective agreements.

- Incapacitated educators are handled according to a prescribed process in accordance with the LRA.

- The LRA is aimed at improving communication, consultation and facilitating in education.

- Employment practices are aimed by LRA at fairness and this is done in conjunction with legislature.

- The LRA ensures the stability of the employment relationship between the employer and the employee.

## (c) Basic Conditions of Employment Act, 75 of 1997 as amended by changes of 2001 (BCEA)

The BCEA stipulates according to Fabbriciani (2003:6) the minimum terms and conditions for employment by means of the regulation of basic conditions of employment. Minimum working conditions are set in place by the BCEA, which cover most employment relationships (Butterworths Labour Relations Training Library, 2000a:15).

School principals must therefore consider the stipulations of the BCEA regarding HRM of schools. Fabbriciani (2003:6) states that:

- minimum terms and conditions of employment not described in the service contract are automatically regulated by the BCEA;
- the BCEA describes the minimum terms and conditions of employment;
- employees and employers can negotiate conditions of service that are more beneficial than the prescribed requirements of the BCEA.

## (d) Employment Equity Act, 55 of 1998

This Act is instrumental in removing all forms of employment discrimination (Nel, 2001c:97). Over and above the elimination of unfair discrimination it also promotes the role of affirmative action in the workplace (Butterworths Labour Relations Training Library, 2000a:15).

The aim of this Act can be summarised as follows:

- Promoting equal opportunities and fair treatment in regard to employment, which includes the constitutional right to equality and the existence of true democracy.
- Eliminating unfair discrimination practices in regard to employment.
- Implementing employment equity to address the effect of discrimination.
- Achieving a diverse workforce that is representative of the South African society by means of affirmative action.
- Encouraging and promoting economic growth and development (Fabbriciani, 2003:10; Van Deventer, 2003e:270; Nel, 2001c:96-97 and Free State Department of Education, 2001c:29).

## (e) Unemployment Insurance Act, 30 of 1966

This Act makes provision so that employees can receive compensation (benefits) if they become unemployed (Fabbriciani, 2003:8 and Butterworths Labour Relations Training Library, 2000a:15).

## (f) Occupational Injuries and Diseases Act, 130 of 1993

Compensation payable to employees for work-related illness, injury and death is regulated by this Act (Fabbriciani, 2003: 9 and Butterworths Labour Relations Training Library , 2000a:15).

**(g) Occupational Health and Safety Act, 85 of 1993**

According to the Butterworths Labour Relations Training Library (2000a:15) this Act is aimed at ensuring a safe and healthy workplace for employees (cf. 3.10).

**(h) Skills Development Act, 55 of 1998**

This Act is aimed at ensuring training and skills development of the country's workforce (Fabbriciani, 2003:14 and Butterworths Labour Relations Training Library, 2000a:15) (cf. 3.2.7)

School principals must keep abreast with the contents of related legislation that influence their task as HR manager.

## 2.8.8  Recruitment

### 2.8.8.1  Introduction and definitions

The completion of the HR planning process that identifies present and future staff needs, leads to the recruitment of staff in order to fill vacancies (Rebore, 1998:78). Recruitment is described by DuBrin and Ireland (1993:244) as a process whereby people who are able to do a certain job, or are interested in joining an organisation, are discovered and enticed in order to fill vacant jobs. The potential employees must therefore be available and qualified to fill posts in the organisation (Carrell, et al., 2000:138).

Recruitment in schools starts with the description of the post and the person needed to fill the post. The school principal must take responsibility to see that the recruitment policy of the school will address the staff needs of the school (Ubben, et al., 2001:214). In the FSDoE recruitment for educators takes place by means of the publication of a vacancy list in accordance with Chapter B 3.1 of the Employment of Educators' Act, No. 76 of 1998 (ELRC, 2003b:C-76). Recruitment for administrative, support and hostel staff (non-educators) takes place in accordance with the Public Service Act (No. 84  of 1994). Recruitment of educators is, however, directly influenced by ELRC Resolution 2 of 2001, which determines the absorption of educators declared additional to the post establishment of a school.

According to Thurlow (2003c:61) the following influential factors must be considered in the management of recruitment in schools:

- growth and survival    -    does the school expand or must posts be lost;

- succession planning    -    includes aspects like staff age profiles;

- labour market    -    the availability of staff for recruitment which is applicable here;

- local conditions    -    competitive schools that have an influence on recruitment in education;

- legislation    -    the influence of legislation, e.g. equal opportunities.

Schools in South Africa are not very actively involved in the recruitment process, as Provincial Departments of Education handle it centrally. Schools and SGB's are more involved in the selection and recommendation of candidates. The function of schools, and specifically school principals, regarding recruitment includes the identification of the vacancy and the determination of requirements in regard to the post (Thurlow, 2003c:61-62). Heyns (2003:5) is also of this opinion and states that "recruitment does not play such a prominent role in the school situation as in the commercial sector". The handling of recruitment of staff for SGB vacancies is totally dependent on them where the school principal plays a very big role, especially if the fact is taken into consideration that SGB posts have increased from 5493 in 1997 to 16973 in 2001 (Volksblad, 10 Desember 2003:7), while Volksblad (28 Februarie 2004:2) states that, according to RGN numbers, this number could have been as high as 29939 in 2000.

### 2.8.8.2  Aim of recruitment

The aim of recruitment is to ensure the flow of suitable candidates in order to have sufficient candidates available, thereby being able to fill all vacant posts by means of the selection process (Moore, 1972:5.14). Recruiting activities are aimed at encouraging candidates qualified for a post to make themselves available for employment, but also aims at identifying individuals willing to accept the job offer (Dreher & Kendall, 1996:449). Recruitment plays a major role in ensuring that there will be sufficient applications for a post, because it enables the organisation to be more selective in the selection process (Dessler, 1981:105). Therefore an

organisation must, by means of recruitment, ensure that the general business strategy is realised (Schultz, 2001b:226).

In the teaching profession the general business strategy is the establishment of learning progress and achievement (Department of Education, 2000a:5). The candidates to be recruited must have the abilities to enable the organisation to achieve all objectives. The organisation's need for intellectual capital must therefore be satisfied by means of recruitment and in this way the organisation can obtain a competitive advantage, because staff would create a basis of knowledge (Schultz, 2001b:226). Successful recruitment will entail recruiting staff who are focused not only on their own development, but also on the educational goal of the school and education as a whole (South African Management Development Institute, 2002a: 164).

During the process of recruitment the organisation runs two risks. Firstly, the requirements for a post could be set forward in such a general fashion that much time would be lost because candidates not truly suited to the post would need to be sifted. Secondly, the risk could be incurred that the requirements for the post could be so limiting to potential candidates that qualified candidates could be discouraged from applying for the post. The aim of effective recruiting must be to find a compromise between these two extremes (Novit, 1979:60-61).

Any organisation must aim at creating a strong image to the outside world so that the organisation would be marketed and in this way entice potential applicants (French, 1974:261). The organisation must therefore be marketed as a good and stable employer for potential employees (Desatnick, 1983:27). The view held by people as potential employees towards the organisation will have a direct influence on recruiting and therefore the recruiting activities of the organisation need to market the organisation as employer. It is very relevant in the teaching profession where educators act selectively when applying for posts.

In a worldwide survey done by Desatnick and Bennett (1977:351) they indicated that a high labour turnover with an accompanying high expenditure component could be

imputed to ineffective recruiting. The role played by recruiting in ensuring an effective staff corps can therefore not easily be overemphasized.

### 2.8.8.3  Realistic job previews

The traditional approach to recruitment (including selection), is a process whereby candidates play a passive role and are nearly ignored (Wanous, 1980:42). Through the realistic job preview (RJP) the applicant plays an active role in the process of employment from the beginning.

The aim of the RJP is to make applicants early in the employment process aware of the organisational realities of the post, so that they are able to make a realistic evaluation of their expectations of the post (Mathis & Jackson, 2000:287-288).

The RJP is still the most effective method used by an applicant in having realistic expectations regarding the post (Schultz, 2001d:262). It entails, amongst others, exposing the candidate to the type of task, equipment and working conditions (Werther & Davis, 1989:201). Applicants need to be exposed to the positive and negative aspects of the job (Sherman & Bohlander, 1992:160).

According to Sherman and Bohlander (1992:160) the RJP could result in the following:
- greater job satisfaction
- smaller labour turnover
- better communication
- realistic work expectations

Job survival by candidates can be the result of a proper RJP (Wanous, 1980:43). Organisational objectives and the needs of the applicant can be reconciled from the beginning by means of an RJP (Klatt, et al., 1985:191).

### 2.8.8.4  Labour market

The first step in the recruiting process is the establishment of the relevant labour market (Novit, 1979:60).  Dunn and Stephens (1972:63) view the labour market firstly as equivalent to the market for goods and services where demand (vacant posts) and supply (employees) determine the price (wage). Secondly, the labour market is viewed

as a geographical area where employees are drawn into becoming part of an organisation. Novit (1979:60) postulates that the labour market stretches further than geographical borders, but is determined by all sources from which applicants can be persuaded to apply. The nature of the job will have a definite influence on the geographical area of recruitment. The recruitment of a high profile candidate might take place on a national or even international level, while a labourer would possibly be recruited locally (Chruden & Sherman, 1984:107).

The labour market is determined in accordance with the following factors:

- type of post
- size of the organisation
- image of the organisation
- training
- certification
- licensing requirements
- willingness to move or commute
- expenses that the organisation is willing to undertake in terms of recruitment (Novit, 1979:60).

Recruiting policies are dramatically influenced by changes in the labour market. These could include unemployment levels, shortages or excesses in regard to specific skills, recruiting activities of other organisations and current wages (Klatt, et al., 1985:174). Problems exist in education worldwide in recruiting competent educators for the teaching profession (Ukeje, et al., 1992:236). In South Africa the problem is far more focused on the recruitment of educators for the so-called scarce subjects like Mathematics and the Sciences.

### 2.8.8.5  Sources of recruitment

According to Beach (1985:35) the sources from which recruitment could be undertaken are:

- internal sources
- external sources

McGregor (1991:96) views internal sources of recruiting as a closed system and external sources as an open system.

**(a) Internal sources**

Internal recruitment takes place when present staff of an organisation is considered for vacancies within an organisation (Schultz, 2001b:228 and Griffen, 1990:356).

- **Job posting and job bidding**

Job posting entails the announcement of vacancies on notice boards, newsletters and other forms of communication like pamphlets, post, announcements via public address system and designated posting centres (Beach, 1985:135; Chruden & Sherman, 1984:06 and Bartol & Martin, 1991:412 ).

Job bidding functions effectively when it forms part of the career development programme of the organisation and when staff are made aware of opportunities existing within the organisation. This system encourages employees to take the initiative to develop themselves and to consider posts suitable to their interests and qualifications (Chruden & Sherman, 1984:106).

- **Skills inventory**

Skills inventory and computerised record systems supply information regarding the qualifications of staff that qualify for vacant posts. Staff can therefore be transferred to a similar post, promoted or upgraded within an existing post (Beach, 1985:135; Chruden & Sherman, 1984:106; Klatt, et al., 1985:180 and Sherman & Bohlander, 1992:149).

- **Recall from layoff**

Economic circumstances sometimes necessitate the termination of staff duties. Staff who lost their jobs as a result of layoffs usually, according to union agreements, have first option on posts becoming economically viable again (Sherman & Bohlander, 1992:150 and Chruden & Sherman, 1984:107). It is usually easy to recruit this category of staff and this is usually productive (Schultz, 2001b:228).

- **Informal search**

During an informal search a specific person is considered by management. This has the disadvantage that many other personnel are deprived of the opportunity of being considered for the post (Beach, 1985:135).

- **Employee referrals**

Present employees refer people qualified for a specific post for possible employment. This method is successful because in normal working conditions present staff mingles with and can identify people who can fill scarce vacancies (Werther & Davis, 1989:154 and Cascio, 1995:173).

- **Temporary worker pools**

Cascio (1995:175) describes "in-house temporaries" as employees filling gaps left because of labour turnover as an important source of knowledge. These employees receive benefits depending on the hours worked and save the organisation costs in regard to recruitment agencies.

- **Unions**

Moore (1972:5.1) sees unions as a source of internal employment. This aspect is of great importance should the organisation and a specific union have an agreement only to employ members of that specific union in accordance with a closed-shop agreement (Nel, 2001a:161).

The use of internal sources of recruiting in education is very complicated in regard to Departmental vacancies that have to be filled according to policy and are influenced by factors such as redeployment. SGB posts or the creation thereof, for instance such SGB promotional posts can be advertised internally on notice boards. Unions can, however, play an important role in compiling a list of educators and non-educators, thereby serving as a source of recruitment for schools. Present staff can also be an important source of information in bringing people of whom they are aware to the attention of the school principal.

**(b) External sources**

The use of external sources is influenced by the recruitment policy of the organisation, the type of task and the prevailing labour market (Beach, 1985:135). The management can also decide that new blood from outside is needed for the staff compilation of the organisation (Cascio, 1995:175).

- **Advertisements**

Advertisements are part of the general methods used to publicise vacant posts to prospective applicants (Sherman & Bohlander, 1992:153). Advertisements can be utilised in the following manner:

  ➢ written media like newspapers, magazines, posters, pamphlets and notice boards;

  ➢ direct mail where the advertisement is aimed at professional people in professional journals and magazines;

  ➢ entertainment media including the radio and television;

  ➢ internet recruiting (Sherman & Bohlander, 1992:153; Moore, 1972:5.14; Carrell, et al., 2000:156-157; Schultz, 2001b:230-231 and Mathis & Jackson, 2000:268).

Vacancies at schools must be advertised, with the approval of all advertisements by the Director: Human Resource Management prior to placement. These advertisements must be placed in such a way that it reach the greatest possible audience (Free State Department of Education, 2001c:31)

- **Employment agencies**

In general the following three types of employment agencies are used:

  ➢ public agencies managed by the government;

  ➢ private agencies functioning as private firms;

  ➢ executive search firms concentrating on the recruitment of top executives (Klatt, et al., 1985:185-186 and Cascio, 1995:177).

- **Educational recruiting**

Educational recruiting is also known as campus recruiting and include recruiting at universities, technikons (Universities of Technology), technical colleges and schools (Carrell, et al., 2000:153; Moore, 1972:5.14 and Werther & Davis, 1989:159).

- **Professional associations**

Professional associations include careers like engineering, health care, accountancy and teaching where placements and information services are handled on behalf of members. Congresses are also used to introduce members and possible employers to each other (Beach, 1985:136 and Werther & Davis, 1989:160).

- **Walk-ins and write-ins**

Walk-ins are people looking for work who arrive at a specific organisation and write-ins are persons looking for work who send their curriculum vitae to an organisation (Sherman & Bohlander, 1992:158).

**(c) Other sources**

Other sources of recruitment could be derived from:
- unemployed
- housewives
- pensioners
- employment of dissatisfied and under-utilised persons
- customers
- field trips
- internal recruiting
- open house where people are invited to visit the organisation (Dunn & Stephens, 1972:95; Sherman & Bohlander, 1992:153; Moore, 1972:5.14 and Werther & Davis, 1989:163).

**(d) Recruiting sources in the education sector**

The three most important recruiting sources in education according to Bondesio & De Witt (1990:254-255) are:
- Schools serving as first recruiting source where education students are enticed into the teaching profession by means of study bursaries.
- Tertiary institutions where students are recruited for the teaching profession.
- Qualified educators who are not in the education profession.

School principals have not always been actively involved with recruitment, but it has definitely changed with SGB appointments of educators, administrative staff, terrain staff and hostel staff.

## 2.8.9 Selection

### 2.8.9.1 Definition

Werther and Davis (1989:176) describe the selection process as a series of specific steps followed to determine which recruits are to be appointed. According to Gerber, (1995a:130) selection entails the choice of a candidate who, in the eyes of the selecting panel, is best qualified for the post requirements. The purpose of the selection process is to employ individuals who are able to do the job successfully (Rebore, 1998:102 and Gerber, 1995b:130).

### 2.8.9.2 Importance of the selection process

The selection process is an important and difficult part of the employment process, because it is important for both employer and employee that the right person be appointed for the filling of the vacancy (Marx, 1981:357). The selection process entails a number of steps that candidates move through in order to identify the candidate best qualified for the requirements of the post and sifting candidates who would possibly be less successful (Werther & Davis, 1989:182). Middlewood (1997a:152) sees selection as a critical aspect in the management of a school. By means of the selection process the person is identified who during the selection process was considered to be the best candidate on account of skills, experience, abilities, personal attitudes and future potential, taking into consideration the goal of representativity and a diverse workforce (South African Management Development Institute, 2002a:167).

### 2.8.9.3 Role of the School Governing Body (SGB) in the selection process

The SGB handles the selection process concerning the appointment of educators, after which a recommendation is made to the Head of the Provincial Department of Education to make the appointment. Two types of appointments by SGB's follow the selection process. These are: firstly, educators and non-educators, like administrative, support and hostel staff who are employed and paid by the Provincial DoE; and secondly, staff who are employed and paid by the SGB (Department of Education, 2000b:1).

### 2.8.9.4  Factors that influence the selection process

- **Legislation**

Legal aspects, for instance to eradicate discrimination and ensure employment equity, are the order of the day (Schultz, 2001c:242). The DoE has brought to light a national framework and strategy for the implementation of employment equity in the education sector (Department of Education, s.a.:s.a.) with the aim of enabling the DoE to develop Equity Policies and Plans in line with the requirements of the Employment Equity Act (1998).

- **Nature of the labour market**

The labour market out of which possible employees could be obtained, has a definite influence on the organisation and the country as a whole (Schultz, 2001c:243).

- **Applicant pool**

If the recruitment process was completed successfully and effectively, and there are a number of candidates qualified for the post, then the selection process can take place very selectively. The opposite can also be applicable, should the relevant post need specialised skills and qualifications and the choice would have to be made according to whoever is available or applied for the position (Klatt, et al., 1985:200 and Schultz, 2001c:243). Education, specifically in South Africa, is characterised by a shortage of educators in scarce subjects like Mathematics and Sciences, which plays a great role in terms of the availability of potential candidates for posts.

- **Social pressure and unions**

Pressure from minority groups and unions can push the process of selection in a specific direction (Klatt, et al., 1985:200 and Gerber, 1995b:131). In South Africa it could refer to pressure by majority groups who are the previously disadvantaged groups (Blacks) (cf. 2.8.7.1).

- **Other factors**

Other factors that should not influence education as such but sometimes does, as a result of policy made and procedures followed by the FSDoE are as follows:
- Size of the organisation
- Type of organisation

- Speed of decision-making

- Selection policy of the organisation

- Nature of the job

- Methods of selection (Schultz, 2001c:243; Klatt, et al., 1985:200; Beach, 1985:140 and Mathis & Jackson, 2000:284).

### 2.8.9.5  Validity and reliability of selection techniques

#### (a)  Validity

Selection techniques have validity if they measure what they are supposed to measure and through this it is endeavoured to establish a legitimate relationship between the various elements of selection (Klatt, et al., 1985:201 and Novit, 1979:75). In terms of the selection process validity is an indication of the manner in which information was collected by means of specified processes and techniques that are related, and forecasting in terms of job performance (Sherman & Bohlander, 1992:170). The selection tools will only be seen as usable should the results of their application relate to the expected performance criteria and then preferably be applicable to specific tasks. Such selection procedures are then also seen as job-related or in psychological terms seen as valid (Walker, 1980:259).

#### (b)  Reliability

Reliability in this context means consistency (Dessler, 1981:156). Sherman and Bohlander (1992:171) sees reliability as the extent to which two different selection techniques mirror similar results.

### 2.8.9.6  The selection process

#### (a)  Introduction

The selection process will be described in two sections. Firstly, a step-by-step selection process will be described in accordance with a literature study that will underscore the scientific nature of this study; secondly, the process will be described as it is found in DoE and the FSDoE documentation. The reason for this twofold description is to strive for completeness. Recommendations regarding the selection process as applied by the DoE and the FSDoE will also be handled in Chapter 7 of this study.

## (b)   Steps in the selection process according to literature

### (i)   Introduction

Werther and Davis (1989:183) describe the selection process as twofold road where the organisation chooses employees and the applicants choose the employers. This process commences when people first visit the organisation or when the application is handed in. This can be seen as the first step in the selection process, because the applicant already starts forming an opinion of the organisation and this could further influence the applicant's participation in the process.

### (ii)   Steps in the selection process

* **Preliminary screening**

Preliminary screening already weeds out applicants not qualified for the vacant post (Donnelly, et al., 1992:464). A preliminary screening interview can now be done in person or telephonically with the applicants to remove candidates not qualified (De Villiers, 1995:310 and Crane, 1979:123).

Applicants can be introduced to the organisation through this process and a complete picture can be formed of the applicant (Marx, 1993:360).

* **Application blank**

Bartol and Martin (1991:414) describe an application blank as a form by which information can be collected regarding the applicant's qualifications, job experience, health and other information that could be applied in ascertaining a person's ability to fill a specific position and successfully complete tasks connected to the post. The application blank is generally used because it supplies systematic information regarding the applicant (Sherman &  Bohlander, 1992:175).

Information collected using an application blank should not be discriminatory or restrictive (Cascio, 1986:189). Information should therefore be a valid indication of job performance and also be job-related (Bartol & Martin, 1991:414). Furthermore, it should be just, it should encourage equal opportunity and should not violate a candidate's privacy (Cascio, 1986:190).

- **Testing**

Testing is used in the selection process to form an objective opinion of an applicant's abilities (De Villiers, 1995:312). These days employers are much more careful in the choice and use of testing, but, if applied correctly, testing can play an important role in the selection process (Carrell, et al., 2000:181 and Dunn & Stephens, 1972:125). Employers must take note that applicants have the right to refuse testing. Testing should, if permission has been given for such testing to take place, be done in accordance with legal procedures by qualified testers (Rapport (Loopbane), 15 Februarie 2004:1). It should, however, be seen as an aid in the selection process, used in conjunction with other aids (Andrews, 1985:114). According to Klatt, et al. (1985:207) the testing most often used is performance, intelligence, aptitude, interest, personality and polygraph.

- **Reference checks**

Armstrong (1996:481) views the purpose of reference checks as a means of obtaining confidential information regarding a potential employee, as well as establishing an opinion regarding a person and that person's suitability in obtaining a specific job. Bartol and Martin (1991:418) add that the information obtained needs to be job-related. According to Werther and Davis (1989:199) some organisations omit reference checking as a step in the selection process because of a question mark regarding the frankness of references. Organisations and persons are apprehensive about checking references because of possible character defamation and the legal implications thereof (Armstrong, 1996:482).

- **Employment interview**

  - **Introduction and definition**

The interview is viewed as a traditional component of the selection process and many organisations would not make a decision regarding employment without interviewing, even though interviews are often problematic (Rowland, et al., 1980b:50). Chruden and Sherman (1984:135) view the interview as the most important selection technique. DuBrin and Ireland (1993:250) see it as the most general selection technique, with Beach (1985:163) describing it as the most universal method of selection.

Crane (1979:172) defines the interview as a medium for the exchange of information between two persons. Beach (1985:163) views it as a conversation or verbal interaction between two persons with a specific aim in mind. Bartol and Martin (1991:414) further describe the interview as a relatively formal conversation carried on to evaluate a candidate's knowledge, skills and abilities.

According to Marx (1993:361) a process takes place during an interview where information collected during the selection process is integrated, uncertainties can be rectified and candidates can also voice their uncertainties.

Berry (1998:106) in Schultz (2001c:246) summarises the emphasis still placed on the interview as follows: "Hardly anyone is ever hired for work without being interviewed at least once."

➢ **Limitations of the interview**

The interview is generally viewed as a popular selection technique and is given a very high face value by employers, although it is not a good forecaster of job performance (Griffen, 1990:359 and Mathis & Jackson, 2000:296).

Cascio (1986:191) views the interview as a weak basis for selection, because the decision of interviewers is influenced by factors such as first impressions; personal impressions of the interviewers in regard to characteristics determining job success; the comparison of a candidate's interview with an immediately preceding candidate's interview; and specific forecasting of job behaviour instead of forming a general impression of the candidate.

According to Griffen (1990:359) a bias exists as to how people are judged during a first meeting. The greatest negative element of the interview as selection technique seems to be subjectivity. Decisions regarding employment are taken utilizing a personal opinion permeated by bias and prejudice (Beach, 1985:164-165). In the interview focus is placed on the impression made, instead of the ability to perform the job (Novit, 1979:82).

Middlewood and Lumby (1998:67) postulate that very few interviewers are truly trained to interview. It is certainly applicable to schools, as very few school principals

and the respective SGB are trained to facilitate interviews in a scientific manner. Stokes (1987b:93) states that interviews are not only irrelevant, but at worst misleading, yet it is still the only technique that can be used in appointing staff in official vacant posts at schools. Thurlow (2003c:73) is of the opinion that psychometric tests can play a great supplementary role to interviews, but these are still not implemented in the South African education context.

> **Types of interviews**

The nature of the job will have a great influence on the structure of the interview and what would be achieved by the interview (Rae, 1988:162). Much literature exists as to specific views regarding types of interviews and how they are to be applied. For the purpose of this study emphasis will be placed on structured, semi-structured and unstructured interviews as the main groupings. It will therefore be endeavoured to find the points of contact between different views in literature in order to facilitate the groupings according to Andrews (1985: 120-121) and Bartol and Martin (1991:415).

o **Structured interview**

The structured interview is seen by Mathis and Jackson (2000:296) as a set of standardised questions set to the candidate, creating the opportunity to compare candidates to each other. The most structured interview is described by Cherrington (1995:245) as a patterned interview. The patterned interview is made up of detailed questions prepared on specifically composed forms (Beach, 1985:167). The patterned interview is described by Beach (1985:167) as a standardised interview that is equally descriptive of the definition of a structured interview postulated by Mathis and Jackson (2000:296).

Mathis and Jackson (2000:298) and Mullins (1999:752) identify two types of structured interviews, namely situational and behavioural description interviews. A situational interview is described by Mathis and Jackson (2000:298) as a "structured interview where questions are used to determine how a candidate would handle specific job situations". Andrews (1985:121) and French (1974:275) subscribe to this with a description of a problem interview where a problematic situation is put to candidates, after which personal action as to the situation is to be described. It is therefore also a description of a situational interview.

The behavioural description interview is seen as an interview where the candidate must supply specific examples as to how action had been taken in the past and how specific situations and problems were handled in the past (Mathis & Jackson, 2000:298). Mullins (1999:752) states that, "by means of the behavioural description method, it is determined how a candidate handled a situation in the past, which then gives an indication of future behaviour".

The structured interview is considered valuable because it is trustworthy and the information obtained from the candidate can be interpreted much more accurately (Carrell, et al., 2000:190).

o    **Semi-structured interview**

The semi-structured interview is partially planned and only major questions are prepared beforehand. The interviewer can ask additional questions as the interview develops, should it be deemed necessary.

This interview is much more flexible (Andrews, 1985:120). It introduces a much more comfortable situation for the candidate and also creates a better image of the organisation, because the interviewer can be more conversational with the candidate (Bartol & Martin, 1991:415).

The semi-structured interview is described as an in-depth interview (Sherman & Bohlander, 1992:120 and Beach, 1985:167). Beach (1985:167) calls it a planned or action interview, while Chruden and Sherman (1984:135) categorise the in-depth interview as a structured interview.

o    **Unstructured interview**

This type of interview is also known as a non-directive interview (Schultz, 2001c:248). Little or no planning goes into this kind of interview (Bartol & Martin, 1991:415 and Andrews, 1985:121). The interviewer makes use of broad, general questions (Sherman & Bohlander, 1992:183 and Mathis & Jackson, 2000:299).

The interviewer, without having planned, can ask questions that arise as the interview progresses or questions can be asked according to a few predetermined subjects (Bartol & Martin, 1991:415 and Andrews, 1985:121). The unstructured or informal interview therefore takes on the format of a conversation (Chruden & Sherman, 1984:135).

The problem surrounding this type of interview seems to be that it is not considered trustworthy, and that it often lacks validity because of the absence of structure, which leads to the fact that too few candidates are obtained to evaluate and compare candidates to each other (Bartol & Martin, 1991:415).

The diversity of views regarding interviews is once again emphasised by the view of Mathis and Jackson (2000:296) that the non-directive interview, as they describe the unstructured interview, could rather be categorised as a semi-structured interview.

o **Stress interview**

A stress interview (Mathis & Jackson, 2000:299) is designed to create an anxious and pressurised situation in order to evaluate a candidate's action by the following means: by placing candidates on the defensive; or frustrating, annoying and embarrassing candidates to push them into losing their self-control. This type of interviewing is therefore regarded by Schultz (2001c:249) as an invalid, unpleasant and unethical method.

o **Panel interview**

With the use of the panel interview various interviewers conduct a simultaneous interview with the candidate (Mathis & Jackson, 2000:299). Andrews (1985:121) describes this type of interview as a jury interview. This is a good method to be applied where an appointment is based on the approval of several persons. It is highly useful because it removes personal bias to a degree (Schultz, 2001c:249).

o **Summary**

The interview as selection technique is a very popular aspect of the selection process. The planning of the interview seems to be essential. Included with this is the choice or combination of interviews and the structuring of an interview in terms of the

questioning, as well as the appointment of the interviewer or panel. This process must be handled with care as it creates a specific impression of the organisation to the interviewee.

o **Medical examination**

The primary aim of a medical examination is to determine if a candidate is physically able to do a job, because satisfactory health is important in most jobs, while certain jobs require excellent health (Stone, 1982:207; Maitland, 1991:149 and Fulmer, 1977:311). Should a person, for instance, undertake a job in stressful circumstances, potential dangers must be identified early on (Ream, 1974:267).

o **Employment offer and appointment**

The hiring decision indicates the end of the selection process, on condition that the candidate to whom the job is offered, accepts the job (Werther & Davis, 1989:202). A job offer is made to a candidate who successfully completed the steps of the selection process, that is, the person whose qualification, experience and personality agree with the job specification (De Villiers, 1995:314 and Marx, 1993:361). There is, however, always a risk involved when a selection decision is made. The risk is offering the employment to the person who is not going to be successful and, contradictory, not offering employment to someone who would have been successful, should that person have been given the opportunity for employment (Novit, 1979:86).

**(c) Selection and employment procedure of the DoE as implemented by the Provincial Department of Education**

**(i) Introduction**

The criteria regarding the selection and employment procedure in education as well as the implementation thereof which is specifically focused on schools often become the national and provincial legislation and procedures. This process can be summarised as follows.

Two types of appointments regarding educators, are described, namely:

- Educators who are selected by the SGB, but are appointed in Departmental posts by the Provincial DoE (FSDoE). These educators are in return paid by the FSDoE;

- educators who are selected, appointed and paid by the SGB. The SGB must always ensure that they act within the law regarding their employment procedures.

The prescribed process of the DoE as implemented by the provincial departments is indicated in Figure 2.9

**Figure 2.9: Selection and employment procedures of the FSDoE**

| **DEPARTMENTAL APPOINTMENTS** |
|---|
| Steps taken by the FSDoE |
| Step 1:    Department advertises vacancies and sifts applications |
| **DEPARTMENTAL AND SGB APPOINTMENTS** |
| Steps taken by school |
| Step 2:    Prepare for selection process<br>Step 3:    Draw up a shortlist<br>Step 4:    Interview candidates<br>Step 5:    Make recommendations to the FSDoE |
| **SGB APPOINTMENTS** |
| Steps taken by school |
| Step 6:    Write a letter of recommendation to a successful candidate<br>Step 7:    Draw up a contract<br>Step 8:    Draw up a job description<br>Step 9:    Arrange induction into the new job<br>Step 10: Keep basic staff records |

 (Department of Education, 2000b:1)

**(ii)  Prescribed process**

- **Department advertises vacancies and sifts applications**

  ➢ **Application procedures**

The Provincial Department of Education must publish a vacancy list at least once a year.  Applications for teaching posts are handed in at the office of the education

district where the school is situated. Applications for SGB posts are handed in at the school itself, or at employment agencies.

> **Sifting of applications**

The process of preliminary screening as indicated in literature is not applied in the FSDoE. The FSDoE uses a process of sifting of candidates according to the guidelines of the Personnel Administration Measures (PAM), Chapter B, paragraph 3.2 as negotiated in the Education Labour Relations Council (ELRC). The PAM, according to Chapter B, paragraph 3.2 (a) (i); (ii) and (iii) determines that the FSDoE must:

- give written proof to an applicant that the application has been received;
- clearly indicate if the application is complete or not;
- indicate if the applicant complies with the minimum requirements and that the application can be connected to the school involved.

Paragraph 3.2 (b) determines that the FSDoE will sift the applications to eliminate applications that do not comply with the minimum requirements as shown by the advertisement of the post and (d) that trade unions will receive a full report during a formal meeting of the candidates that do not comply with the minimum requirements as well as of those candidates who do comply with the minimum requirements.

The applications are sifted by officials of the education district by questions like the following:

- Is each application complete? Are certified copies of certificates attached?
- Does the applicant have a recognised qualification for this level of post (e.g. REQV 13), which includes appropriate training as an educator? If not, the application is rejected.
- Does the applicant have appropriate experience?
- Has the applicant taken early retirement or the voluntary severance package? If so, the application is rejected.

The union representatives and the departmental representatives will only be observers of the process. The interview committee must also appoint a secretary to record the following information:

- criteria used in the compilation of the shortlist;
- aspects covered by the interview questions;
- record of the interview questions.

The secretary records all information, including the responses of the candidates and all other relevant documentation.

➤ **Draw up a shortlist**

The interviewing committee must meet after the applications are received from the FSDoE to place the best five candidates (maximum) on the shortlist. The guidelines for the compilation of a shortlist are as follows:

- criteria must be just, non-discriminatory and in line with the country's Constitution;
- criteria must be in line with the curricular needs of the school;
- criteria must be in line with the responsibilities of the employer towards employees;
- the number of candidates on the shortlist may not exceed five.

The interviewing committee must study all documentation of all candidates, which includes the curriculum vitae and they can also contact referees. The candidates must also be invited to the interview in writing.

The Provincial vacancy list can also require further documentation like a curriculum vitae, identity document and proof of registration with the South African Council of Educators (SACE).

The FSDoE (through Education District offices) sorts applications according to the advertisement in the vacancy list. The documentation is then sent to the relevant schools.

> ➢ **School prepares for selection process**

An interview committee that is a subcommittee of the SGB, must be compiled. The interview committee takes responsibility for the selection process and thereafter for the recommendation for employment.

The interview committee is made up of:

- departmental representative (that could also be the school principal) and an HR representative;
- the school principal if not the departmental representative;
- members of the SGB that exclude educator members if they are applicants;
- one union representative per union represented in the ELRC.

> ➢ **Interview applicants**

An interview is described as a short appointment with future employees with the purpose of forming impressions of the individuals regarding personal qualities, work competence and performance in previous jobs. By means of the impressions of a person obtained during the interview, it will be endeavoured to forecast how every individual will perform should that person be employed by the school.

All candidates must be given an equal opportunity during the interview and that is why the same questions must be put to every candidate in every interview, although it does not have to be in the same order.

Suggested questions that could be set to the candidate are as follows:

- General questions
- Questions about experience
- Testing of professional experience
- Personal questions

The following recommendations are made regarding the interview.

- The panel should be friendly and the candidate should be put at ease.
- Thank the candidate for applying for the post and congratulate the candidate on his/her selection to the shortlist.

- Ensure that every candidate understands the questions and show interest in the candidate's answers.
- During the interview the panel should not try to showcase their own knowledge and experience.
- The panel must show a natural reaction to the candidates' answers and every candidate should be given the opportunity to air their views.
- The interview should be just, non-discriminatory and in line with the Constitution.

The SGB can discuss the candidates briefly at the end of the interviews and fill in a rating form. The candidates are now listed in the order of their performance during the interview. The rating and ranking of candidates form only part of the process, because the interview committee's personal impressions can also be considered. It may even lead to a vote.

> **Make recommendations to the Department**

As soon as the interviewing committee compiled the ranking list, this list must be submitted to the SGB with the reasons for their choice. The SGB must then approve the rating list and make their recommendation regarding the filling of the post to the DoE who can then make the appointment. The decision must comply with the Employment of Educators Act, 76 of 1998, The South African Schools Act, 84 of 1996 and the Labour Relations Act, 66 of 1995.

The SGB, interviewing committee and unions may not make the result of the interviews known to the candidates until the Provincial DoE finalised the appointment of the candidate.

> **Write a letter of appointment to the successful candidate**

The Provincial FSDoE will appoint the candidates who were successful in Departmental posts and will contact the successful candidates, while the SGB will fulfil this function as to SGB appointments. The SGB must, in terms of SGB appointments, inform the successful candidates of their appointment and must let unsuccessful candidates know of the result of their applications.

> ➢ **Draw up a contract**

In making SGB appointments, the SGB must draw up contracts which would comply with legal requirements as stated in the Labour Relations Act (LRA), 1995 and the Employment of Educators Act, 1998.

> ➢ **Draw up a job description**

The SGB appointment must receive a clear job description in order to clarify what his/her job entails and the roles and responsibilities of others in the school will also be qualified.

> ➢ **Induction into new job**

All new appointments at a school must undergo an induction programme to get to know the school, colleagues and the job. Induction will be investigated fully later in this chapter (cf. 2.8.11).

> ➢ **Keep basic staff records**

Proper staff records must be kept. Administration of HRM is covered in Chapter 3. (Department of Education, 2000b:1-27; PAM, 1998:3c-25; ELRC 1998a; Free State Department of Education, s.a. a:s.a.; Prinsloo, 2003c:208 and Free State Department of Education, 2002b:4)

### 2.8.9.7 Factors influencing the selection process in schools

According to Heyns (1998:124-125) the selection process in schools is influenced by internal as well as external factors.

**(a) Internal factors**
- Size of the school – the number of learners in a school determines not only the number of posts (including educators and non-educators), but also the variety of posts in the school.
- Qualifications, skills and experience of present staff play an important role, because staff that are appointed at the school must fit in exactly with the needs of the school in comparison with the present staff.

- Learner composition of the school – the needs of learners, as well as their choice in terms of medium of instruction used, has a big influence in regard to staff.

- Parents corps – the parents of the school must be satisfied with the educators teaching their children, because it can avoid future conflict.

**(b) External factors**

- The nature and compilation of the school community which has its own preferences influence the selection process in schools.

- The Provincial Education Department and Education District Offices have specific prescriptions that greatly influence the selection process. An example of this is the management of redeployment in schools.

- The Government and Department of Education and Provincial Department of Education greatly influence the selection process in schools by means of legislation and regulations. Examples are affirmative action; budget allocation to Provincial Departments of Education and medium of instruction in schools.

- The role of unions in keeping a vigilant eye on the selection process to protect the interests of their members.

The selection process as suggested by literature and the DoE (implemented by the FSDoE) has been discussed and clear differences as well as lack in policy and prescriptions as to this are very clear.

## 2.8.10  Placement

Placement is viewed as an extension of the selection process by Marx (1993:361), while Stone (1982:176) sees it as part of the selection process.

Candidates who successfully completed the selection process, must now be placed in the correct job where the talents of these persons could best be applied (DuBrin & Ireland, 1993:252 and Crane, 1979:136). A decision must be made as to which job is to be allocated to an individual (Stone, 1982:176). This process can be applicable to newly appointed employees or existing employees who are promoted, transferred or demoted.

Placement therefore takes place when there is a new job to be filled or an existing post that must be filled (Marx, 1993:361). The eventual goal is to match an employee with a job where that employee will perform well (Walker, 1980:261). The right person must therefore be placed in the right position (Andrews, 1985:129). This ensures effective placement, which could eventually have a determining influence on the productivity and retention of employees (Marx, 1993:301 and Andrews, 1985:129). Correct job placement lessens the risk of staff turnover should the abilities of the employee be suited to the job demands and this necessarily leads to the minimizing of stress (Nicolson & Martocchio, 1996:610).

Placement does, however, not always take place, because organisations identify a candidate with a specific post for which applications are made. Pre-placement therefore takes place because application is made for a specific post. It could, however, be beneficial for the organisation and the specific person if consideration is given to the placement in more than one post (Stone, 1982:176).

Klatt, et al. (1985:220-221) postulate that placement plays an important role in opposition to traditional selection or rejection of applicants, because it can play a major role in the filling of jobs in a limited job market where a possible shortage in specific areas could develop. Placement instead of selection is also very successful in big organisations with diversified job composition and this can limit the costs for recruiting and selection.

Placement could be viewed as an experimental step, where the employee is placed on probation, which could possibly lead to dismissal at a later stage but this experimental placement can later on be reconsidered for alternative placement should the initial placement prove to be incorrect (Pigors & Myers, 1965:372-373). Placement can therefore be seen as a last step in the employment process, but not a final step, because it can be reconsidered (Andrews, 1985:129).

## 2.8.11   Induction

Induction is seen as closely linked to aspects like supply, recruitment and selection of staff. The opinion is held that induction starts as soon as a person receives a job offer.

In South Africa the educational system cannot afford losing educators, simply because their first experiences in schools were ineffective and unfortunate, and therefore it is important that beginner educators receive the best possible start in education. Effective induction aimed at beginner educators, experienced educators appointed in ordinary or promotion posts, existing staff, educators initially promoted, substitute educators (including all categories of staff) and the school principal, is critically important for the successful functioning of any school (Middlewood, 2003a:81 and Heyns, 2000:161). This view must also be extended with regard to the induction of non-educators.

### 2.8.11.1  Introduction and definitions

Induction, orientation and socialisation will initially be defined separately, but for the purpose of this study the process will be viewed as induction. Carrell, et al. (2000:204) state that induction is also known as orientation or socialisation, while Schultz (2001d:261) describes the whole process as socialising, which includes orientation and induction.

Schultz (2001d:260-261) describes induction as a process endeavouring to draw candidates into an organisation and transforming that person into a productive employee. The new employee is informed regarding the set-up in which work will be done and the procedures that will have an influence on their abilities to do the job (Halloran, 1983:333).  Through induction it will be endeavoured to make the new employee feel at home and to introduce them to their jobs, co-workers and the organisation (Maitland, 1991:155 and Mathis & Jackson, 2000:325). By means of this the danger of resignation within the first weeks of employment, as proven by research, is excluded (Fowler, 1987b:105).

Orientation is described by Schultz (2001d:261) as a process whereby new employees are informed as to what is expected of them in the job that they are filling and to grant support in the transitional process to which the new employee is submitted. According to Klatt et al. (1985:305) orientation aims to create an atmosphere for a positive, long-term relationship between the employee and the organisation.

Through socialisation it is endeavoured to establish specific prevalent attitudes, standards, values and patterns of behaviour (Schultz, 2001d:261). Sherman and Bohlander (1992:207) state that orientation socialises employees within the organisation, where socializing is the process where the new employees obtain knowledge, skills and attitudes that would make them successful candidates of the organisation. Socialisation therefore aims at unity between the individual and the organisation's objectives.

A well-planned induction programme ensures that new employees identify with the organisation and procedures; that they are part of a group and that the job that they do is important to the organisation (Sayles & Strauss, 1977:202). An opportunity therefore exists for the organisation and the new employee to get to know each other better by means of the induction process (French, 1974:331).

A new job is an emotional experience for any person and first impressions are usually lasting (Lopez, 1975:309). That is why anxieties and uncertainties of new employees need to be handled sensitively and why their needs must be considered (Carrell, et al., 2000:204).

Induction is a continuous process that commences with the first contact of a new employee with the organisation (Mitchell, 1974:186). Induction takes place right through the selection process and is preceded by recruitment and selection and followed by training and development (Maitland, 1991:155 and Carrell, et al., 1999:204). Induction of new employees as a comprehensive and systematic process must be continually monitored and evaluated (Tyson & York, 2001:141).

The induction process can therefore be summarised as a process where a new employee is introduced to the goals, policy, procedures, values, co-workers as well as the job to be executed and, if applicable, the equipment with which they come into contact (Carrell, et al., 2000:204).

### 2.8.11.2  Purpose and advantages
The purpose and advantages of induction can be summarized as follows:

- Facilitating and speeding the socialisation process and giving every new employee the feeling of belonging to a specific work group.

- Lessening anxiety, stress and uncertainties.

- Enabling the new employee to become productive as soon as possible.

- Establishing a positive attitude towards the organisation and therefore intercepting negative influences and creating a pleasant atmosphere in which to adjust.

- Creating good first impressions of the organisation, because first impressions are usually lasting and this can make recruitment processes easier and eliminates early resignations.

- Creating realistic job expectations with the new employee, because the selection process can create unrealistic expectations – it also controls the cognitive disharmony in terms of what is expected and what is found and experienced.

- Saving the time of co-employees and supervisors because less uncertainty exists that need to be handled; eliminating unnecessary mistakes.

- Good relationships are built with co-employees, which include peers, subordinates and supervisors.

- Introducing new employee to procedures, organisations, composition, aims for the organisation and his/her role in the realisation thereof, basic responsibilities and values.

- Incurring lower recruiting and training costs and facilitating the learning process so that it can be concluded faster.

- Decreasing absenteeism.

- Causing a much lower labour turnover (Marx, 1993:363; Lopez, 1975:309; Mathis & Jackson, 2000:324-325; Andrews, 1985:146; Werther & Davis, 1989:223; Carrell, et al., 2000:204 & 208; Stone, 1982:220-221; Sherman & Bohlander, 1992:209; Schultz, 2001d:261; Dransfield, et al., 1996:159-160 and Fowler, 1987b:105).

### 2.8.11.3 Reasons for ineffective induction

Various authors (Carrell, et al., 2000:208-209; Werther & Davis, 1989:282 and Cascio, 1995:241) agree that the reasons for ineffective induction are as follows:

- Supervisors neglecting this aspect so that it can nearly be viewed as the weak point in the induction process.
- Ignoring the fact that the anxiety and stress, which can be subscribed to uncertainty and unfulfilled expectations, result in a high labour turnover.
- Holding the view that effective recruitment, selection, training and development replace induction.
- Having incomplete induction programmes.
- Placing too little emphasis on loyalty and commitment towards the organisation.
- Internally promoting or transferring employees who are not exposed to an induction programme.
- Lacking follow-ups of the induction process.
- Placing emphasis on the image of the organisation rather than the employee.
- Placing too much emphasis on immediate paperwork.
- Immediately allocating tasks without proper induction.
- Allocating meaningless tasks to the new employee.
- Giving too much information too fast to the new employee.
- Giving insufficient attention to the problems that a new employee may experience in being taken into a group.

### 2.8.11.4  Responsibility for induction

Carrell, et al., (2000:209) state that the number of persons that are going to be involved in the induction process will depend on the size of the organisation. In a small organisation the manager or supervisor will handle it, while a team in a big organisation will handle it.

The school principal will generally delegate the induction task to a senior staff member, usually a member of the School Management Team (SMT) (Department of Education, 2000b:30).

### 2.8.11.5  Management of induction in schools

A formal induction process for schools is recommended, because it leads to consistency in application and more effective application of HR, especially in bigger

schools. An important aspect of induction in a school is exposing the new member of staff to the widest possible range of staff and supplying information in manageable portions. It can also lead to the development of informal opportunities for the establishment of interpersonal bonds between new and existing staff. Examples of the scope of induction can be to enable the school principal to handle the vision and values of the school; the terrain manager can introduce the newcomer to the building layout; the deputy principal can discuss the school organisation with the newcomer and the secretary can handle the administrative functioning of the school.

The exposure of newcomers to diverse people and aspects of the school should provide the newcomer with the opportunity to overcome the challenges of the new environment. Furthermore it transfers the message to the newcomer that the school believes in empowerment and also that the school principal is not the centre of attention and that everything does not revolve around the school principal.

Induction programmes in schools must definitely receive much attention. It is important that the gap needs to be bridged between the view of the school principal as to what should be done to help a newcomer and what the newcomer actually experiences eventually (Middlewood, 2003a:83-87).

### 2.8.11.6 Usage of mentors in schools

Middlewood (2003a:89) states that professional mentorship is based on the principle that support from others is needed in order for someone to develop. The support of a newcomer by an experienced person is invaluable. It can be of great value at all levels in a school, and can vary from a beginner educator to a newly appointed school principal or even a terrain worker. A mentor is therefore seen as a colleague on a higher or similar level to the newcomer for whom the mentor is responsible, and the mentor can be used as a source of information regarding work-related issues. It plays an increasingly important role as it is becoming harder to find someone within the organisation (school) to give objective feedback. It is therefore important that a mentor should be a senior person in the organisation who can indicate to individuals in which aspects they can grow and how to bring this about (Sunday Times (Careers), 15 February 2004:1).

Middlewood and Lumby (1998:75) see mentoring as one of the most general ways of ensuring that induction in schools functions effectively, although it can also play a role in the support and development processes in a school. Both educators and non-educators should benefit from the effective functioning of mentorship in a school. Therefore Mumford (1987:207) views a mentor as a halfway house between the manager (school principal) and a colleague. The mentor thus takes specific responsibility for a junior colleague.

Mentoring in terms of effective HRM is based on the following assumptions:
- The best context within which growth of an individual takes place, is where a person is viewed as an individual and as a colleague.
- Individuals do not develop in isolation; therefore feedback is imperative.
- Every step in development starts with the revision of the present position.
- Asking for help should not be seen as a sign of weakness.
- Mutual learning relationships in a school is beneficial to everyone employed at the school (Middlewood & Lumby, 1998:75).

Mentorship's great success is based on the principle that it is important for many people to transfer their knowledge to others. Therefore it has the following benefits:
- an experienced person acts as a sounding board, being non-judgemental at the same time;
- guidance and support are presented;
- constructive feedback is given in regard to progress (Middlewood, 2003a:90).

To achieve success as mentor, one should display the following characteristics:
- having the ability to share ideas, perceptions, understanding and values;
- being an active listener;
- clarifying ideas and perceptions;
- possessing the ability to be focused;
- displaying the ability to challenge in a non-aggressive manner (Middlewood, 2003a:91).

Mentorship can play an important role in the induction process in schools. School principals must, however, view it as an aspect of induction and not as the induction process itself.

### 2.8.11.7  Designing an induction programme

#### (a)  Introduction

An induction programme should be designed to give the new employee all the information that will be needed to establish the employee in the organisation (Carrell, et al., 2000:215).  The information included in the induction programme will vary according to the specific organisation (Beach, 1985:256). The induction programme must also be adjusted to the different groups of employees and is not only applicable to the newly appointed employees, but also to the transferred and promoted employees, as well as present staff. The categories of staff referred to are the following:

- beginner educators;
- educators with a break in service;
- experienced educators who are new to the school;
- educators promoted internally, or promoted from another school;
- educators given new work assignments because of redistribution of tasks (Bondesio & De Witt, 1990:263).

Administrative, hostel and support staff must also be exposed to induction. The induction of educators and the categories of non-teaching staff mentioned will be further addressed in Chapter 6. The information that will be made available during the induction process can be divided into "need to know" and "nice to know" information. "Need to know" information will be made available to newly appointed employees immediately and "nice to know" information will be made available over a period of time (Carrell, et al., 2000:209-210 & 215).

#### (b)  General topics and job-related issues

Schultz (2001d:262) and Carrell, et al. (2000:215) categorise information applicable to induction as general topics and job-related issues.

**(i) General topics**

- Organisational (school) history
- Organisational structure (organogram)
- Lay-out of physical facilities
- Policy and procedures
- Disciplinary hearings
- School-community relationships
- Role of the responsible official
- Introductory information (Schultz, 2001d:262; Bondesio & De Witt, 1990:265 and Department of Education, 2000b:32).

**(ii) Job-related issues**

- Introduction to colleagues and management
- Teaching and curriculum management
- Learner management
- Professional practices (Schultz, 2001d:262; Bondesio & De Witt, 1990:264-265 and Department of Education, 2000b:38).

**(c) Employee handbook**

The purpose of the use of the employee handbook is to make information and guidelines concerning the functioning of the organisation available to all staff (not only newly appointed staff) (Klatt, et al., 1985:305).

The employee handbook should, however, not contain too much information to prevent its use becoming complicated. Aspects contained in the employee handbook should be handled in short (Carrell, et al., 2000:213). The use of an employee handbook has a built-in risk that it could be viewed in litigation procedures as a contract of employment. The organisation should therefore make the employee aware that the employee handbook is not a contract, but should be viewed with care as if it were a contract (Schultz, 2001d:266).

**(d) Induction checklist**

An induction checklist can be used to ensure that important aspects are not missed. This induction checklist can also lead the person handling the induction into giving

more attention to a new employee (Sherman & Bohlander, 1992:209 and Chruden & Sherman, 1984:183).

**(e)  Induction kit**

An induction kit containing documentation that can be used by the new employee to get information regarding aspects of the organisation can be made available to each new employee. Examples of such documentation are, amongst others: telephone list, map of the facility, policy handbook, organogram  (Cascio, 1986:216-218; Sherman & Bohlander, 1992:210-211 and Chruden & Sherman, 1984:184).

**(f)  Induction follow-up**

Organisations are at fault when they act according to the supposition that the new employee, after having undergone an induction process, is fully equipped to simply go ahead and carry out tasks without any further assistance and support. (Cascio, 1986:216).

At the end of the first working day a conversation should be held with the new employee and the process should continue for the first week and after that at the end of the first month and even at the end of the first year (Sherman & Bohlander, 1992:211). This argument is taken further by Mathis and Jackson (2000:329) when they state that it would be a bad assumption to think that employees will forever know everything regarding their job and the organisation.

The induction process should therefore be evaluated to determine its success. It can be done by means of questionnaires, interviews and even group discussions (Schultz, 2001d:271). After the supervisor or manager (school principal) has completed the induction process with the new employee, the checklist should be signed by both the new employee and the supervisor or manager (school principal) and placed on the personal file of the new employee (Sherman & Bohlander, 1992:211).

The role played by induction in regard to newly appointed staff cannot be overemphasised, especially seen with reference to the great change in education regarding the professional demands on educators, like appraisals and assessments of staff, relationships with the school community, relationships of the staff internally, changes in the curriculum and extensive changes in education as a whole (Tickle,

1994:3). Schools have a moral responsibility in regard to effective induction, as it greatly influences the teaching taking place in schools and the costs undertaken in training educators (Middlewood & Lumby, 1998:72).

Induction is therefore an indispensable process in the proper functioning of the employee within the organisation and should be approached with great enthusiasm, care and order by all organisations, including schools.

## 2.8.12 Career management

### 2.8.12.1 Introduction

People's expectations in terms of reward and satisfaction in jobs differ. Some people work because they have to work to earn a salary. Others are not only looking for a good salary and benefits, but the job itself also plays an important role in their lives. These people are totally dedicated to their work and do it with pride and obtain enormous satisfaction from their jobs. Therefore it is of extreme importance that HR professionals or managers should play an active role in the designing and implementation of programmes that would provide help to employees not to focus solely on a career choice or specific objectives, but rather on the achievement of the abovementioned objectives (Carrell, et al., 2000:344-347). Career management is also influenced by aspects such as career success, which includes aspects like traits, attitudes and behaviours that educators believe are seen as valuable by their employees (Sparrow & Hiltrop, 2000:75). Mda (1997:19) postulates that the planning of a career in education is very problematic for educators as proper promotional guidelines do not exist and many educators (specifically African educators) who are not ready for promotion, are, in fact promoted and furthermore authorities, and not the individual, determine staff movement.

If the management of career planning and development is effective, employees will achieve their full potential. The eventual result will be that employees will not move outside of the organisation for other employment (Nel, 2001b:499). The employee also has an important role in the management of career planning and development, because the employee must show interest in the process (Werther & Davis, 1989:278). Organisations will have to learn to accept the desire of the employee to

grow in his/her job and to recognise this, because people are looking more and more for greater self-determination. This is an enormous challenge for any organisation (Leach, 1980:321). In a rapidly changing and growing technological society, organisations should aim at making the best possible use of their most valuable asset, namely their employees (Stone, 1982:316).

### 2.8.12.2 Definitions

### (a) Career

Werther and Davis (1989:277) describe career as all the jobs that a person has held in a working life, with Beach (1985:232) adding that a career is a lifelong series of jobs that are integrated with the attitudes and motives of the individual holding these jobs. DuBrin and Ireland (1993:541) add that this lifelong consecutive sequence of jobs follows a coherent pattern.

### (b) Career management

Carrell, et al. (2000:347) describe career management as a process during which certain goals, plans and strategies are designed and implemented to enable HR professionals or managers (school principals) to satisfy the needs of the organisation's labour force and to create opportunities for individuals to reach their career objectives. Bartol and Martin (1991:807) view career management as a continuous process that addresses, according to Gold (1999a:179), not only the needs of the individual, but also of the organisation.

Carrell, et al. (2000:347) divide career management into two concepts, namely individual career management and organisational career management.

- **Individual career management**

Individual career management is a process during which every employee plans individual goals (Carrell, et al., 2000:347).

- **Organisational career management**

During this process the management plans career goals for the employees (Carrell, et al., 2000:347).

**(c)  Career planning**

Career planning represents the choice that the individual makes regarding jobs, employers and the route followed by a career (Klatt, et al., 1985:380). Rothwell and Kazanas (1994:342) describe it as a process during which career goals are identified and planning is done as to how those goals will be achieved. Lundy and Cowling (1996:198) focuse on career planning as a process during which supply and demand as well as development plans tries to supply a continuous stream of individuals who could lead the organisation into the future.

**(d)  Career path**

Career path is the consecutive pattern of jobs that makes up an individual's career (Klatt, et al., 1985:380).

**(e)  Protean career**

Here the individual, and not the organisation, is in charge of an own career. Emphasis is placed on self-fulfilment, satisfaction and psychological welfare rather than external success. Individuals who experience protean career believe deeply in job satisfaction and knowledge as well as a professional connection where the emphasis is placed on loyalty towards the own self and not necessarily towards the organisation, even though these individuals are usually strong achievers (DuBrin & Ireland, 1993:541).

**2.8.12.3  Individual career management**

Individual career planning entails the setting of personal objectives, as well as developmental activities which would help achieving these objectives (Walker, 1980:327).  The focus is therefore on the individual career instead of the needs of the organisation (Mathis & Jackson, 2000:368). This entails a personal process by which an individual plans an own future that is undertaken by the individual and is aimed at individual goals and skills (Walker, 1980:327 and Mathis & Jackson, 2000:368). The responsibility for individual career planning still lies with the individual (DuBrin & Ireland, 1993:551). This can take place within or outside of the organisation to which the individual is connected and is equally important for the new job seeker as well as the employee already in service (Mathis & Jackson, 2000:368 and Nel, 2001b:503).

During this process individuals analyse their interests, values, goals, capabilities, consider available opportunities, make career choices and set personal development plans. They also assess skills, set ambitions and determine needs (Walker, 1980:327 and Carrell, et al., 2000:349).

Individual career planning can entail formal educational strategy on the long term, like the acquiring of an MBA or attending short courses or seminars on the short term (Carrell, et al., 2000:349).

Beach (1985:234-235) describes five steps in the individual career planning process.

- Do self-appraisal regarding skills, interests, values, strengths and weaknesses.
- Identify opportunities within or outside of the organisation that links into the individual's own profile.
- Set long term, medium term and short term goals.
- Make plans to achieve career goals.
- Implement plans.

Individual career planning therefore entails a systematic process during which the individual collects information regarding existing and future opportunities in the organisation, but can also include movement to an outside organisation (Carrell, et al., 2000:349 and Klatt, et al., 1985:390).

### 2.8.12.4  Organisational career management

Organisations can, by means of effective career planning goals, be helpful to the individual employee in terms of career development. An effort must be made to establish a pool of talent within the organisation (Werther & Davis, 1989:294).

Klatt, et al. (1985:386-389) emphasise four steps in an organisational career management.

- **Identify employees in the programme**

The ideal would be to make all employees part of the identification process, but it is not always possible because certain employees are on a plateau or close to

retirement, while other employees' interests lie outside the organisation and others view the organisation as the opponent. Care must, however, be taken to avoid only identifying employees earmarked for management training and then ignoring the lack of human resources that could otherwise make a contribution in other areas.

- **Establish career paths**

Career paths are determined that would lead to a logical progression between jobs.

- **Establish programme responsibilities**

Organisational policy and prescriptions must be established with clear responsibilities for the management of career development.

- **Develop individual plans**

Freedom must be given to the employee to plan a career within the organisation.

## 2.8.12.5  Factors influencing successful career management

According to Grobler, et al. (2002:354) successful career management is managed by the following factors:

- career management must be planned thoroughly within the organisation (school) because haphazard or half-hearted efforts will fail;
- top management must support this process;
- aspects like organisational and individual career planning, integration of organisational and individual career plans and an adequate process of evaluation and implementation must take place;
- career matching must take place between the individual career plans of staff and the employer's (school's) personal views.

School principals must seize career management and planning of all categories of staff at the school as a great opportunity to get to know staff better and to motivate staff by means of interest and the creation of opportunities. This need not be promotion, but more responsibilities, for instance acting as grade manager or learning area manager or even sport manager could very well serve as a motivating factor and career development for many people.  Career management should also be part of a strategy by the FSDoE for developmental purpose.

## 2.9   CONCLUSION

HR provision is an important phase in HRM with the school principal playing a very important role. A large part of this management task is done in co-operation with the SGB and FSDoE. When making SGB appointments, the school principal and SGB is responsible for the whole process of HR provision. The school principal plays a leading role in the functioning of the SGB and therefore it is important that all school principals will understand this phase of HRM and be able to handle it properly.

In the next chapter attention will be given to human resources maintenance as management task of the school principal.

# CHAPTER 3

# HUMAN RESOURCES MAINTENANCE

## 3.1  INTRODUCTION

It makes no sense to spend time, money and HR on the appointment of the right people in the right positions to ultimately relinquish them then to other organisations because they are not being looked after. Therefore the organisation must make a concerted effort to make it as pleasant as possible for the employee in the working environment, to look after the interests of the employee and then offer the employee the opportunity for growth and development. Organisations must make it possible for employees to achieve their own objectives in order to achieve the objectives of the organisation (Marx, 1993:365).

## 3.2  TRAINING AND DEVELOPMENT

### 3.2.1  Introduction

Training and development is seen as totally different, yet very much the same in literature. The following literature study will give an exposition of the different views, and show the impact thereof on the strategic management of HR. One of the most important functions of HRM is to help staff become effective at their jobs. The school principal must take the initiative in helping staff with this (Tyson & York, 2001:16). According to Mapesela (1997:9) the main goal of staff development can be seen as an effort at improving education. By means of training and development the school principal can fulfil a great role in helping staff perform their jobs effectively, thus promoting effective learning in the school. Professional development in the education context entails those activities with which educators are involved to extend their knowledge, skills and attitudes in such a way that it will lead to more effective educational practice. Staff development should, however, not only be linked to educator development, but must be extended to all staff categories in the school (Lumby, 2003b:139-140).

### 3.2.2 Philosophy of training and development

#### 3.2.2.1 Learning organisation

Training and development is receiving much attention in terms of policy making and management research throughout the world. Greater emphasis is placed on the workforce qualifications and skills with a growing view that the organisation should be a learning organisation. It is especially applicable in countries with economic problems in an effort to improve economic growth and productivity (Noble, 2000:87). The ability to perform must therefore be developed (Torrington & Chapman, 1979:116). The organisation's investment in HR development with the focus on employers' development sends a strong signal of the organisation's intention in regard to its employees and the community (Gold, 1999b:274). HRM must concentrate on promoting and supporting learning throughout the whole organisation (Bramham, 1989:28).

The question that can be put is "why employees are trained by organisations?". The answer to this question entails a definite effort at improving the profits of the organisation (Baron & Kreps, 1999:372). In a school situation this comes down to the emphasis placed by the school principal on the teaching and education task of the school by better equipping every educator and the supporting staff corps for their task. This will have a definite influence on the success of the school in achieving short term goals and the long-term education ideal. Sustained professional growth is of cardinal importance and the mindset of the school principal in regard to the training and development of the school's staff corps will have an influence on the eventual success in the training and education situation (Bondesio & De Witt, 1990:285-286).

#### 3.2.2.2 Training and development as an investment

Organisations should view the costs involved in training and development as an investment rather than an expense, because this investment in HR is a trigger for the progression of the HR policy and is aimed at recruiting, retaining and compensating employees. This investment is a way of creating a primary internal market and policy regarding the upgrading of skills and by this means addressing the organisation's dependence on external resources for skills (Gold, 1999b:274).

### 3.2.2.3 Holistic approach

Dulebohn, Ferris and Stodd (1996:39) suggest a much more holistic approach in regard to the specific functioning of training as an independent HR function. They place the emphasis on an organisational strategy within the complex, changing surroundings characteristic of modern mankind. This holistic view wants to establish the concept that the idea of learning, focused on individual and organisational levels, is a critical factor in the creation of a competitive advantage, because learning is the only strategy that could cope with change (Gold, 1999b:274). Training is aimed at changing people in terms of knowledge, experience, views and other elements of behaviour, but people will only accept and embrace this change if they benefit from the process. Training should be recognised effectively as a need by both the employee and the organisation (Torrington & Chapman, 1979:116-117). An effort is therefore made to integrate learning and work (Gold, 1999b:274).

### 3.2.2.4 Strategic training and development

Strategic training and development aims at bringing HRM in line with the organisational strategy (Lundy & Cowling, 1996:243). The focus is set on providing and organising a learning experience in order to ensure the realisation of the organisation's goals and to bring it in line with the organisation's mission, goals, knowledge, abilities and enthusiasm. This will bring about continuous growth for both the employees and the organisation (school) (Harrison, 1993:300).

## 3.2.3 Description of training, development and education

Training and development is seen as a key factor in making it possible for the organisation to achieve its strategic, business and operational goals (Carrell, et al., 2000:308). Walker (1980:265) postulate that training and development are closely linked in practice and that it is difficult to distinguish them indissolubly from each other, while Bartol and Martin (1991:419) indicates that the distinction is not clear, because upgrading of skills in the present job (training) improves performance in future jobs (development). Lunenburg and Ornstein (1991:478) differentiate between training and development as follows: training is aimed at lower levels of staff and staff who perform more technical work, like terrain managers and terrain staff, but development is aimed at administrative and professional staff.

Next an overview will be given of education, training and development.

- **Education**

Education is described as an academic orientation where knowledge is obtained and examinations are written (Lundy & Cowling, 1996:244). This employee education is used to describe basic skills and training programmes (Carrell, et al., 2000:308). Nel (2001b:467) emphasises education as that activity that pertains to the provision of knowledge, skills, moral values and understanding necessary for the normal course of life. Education, and more specifically the qualification and skill obtained, is therefore used by organisations as a selection mechanism at the appointment of personnel. That serves as an indication of the user value of education in this case (Lundy & Cowling, 1996:244). Education can furthermore be described as training people to do a different job (South African Management Development Institute, 2002d:6).

- **Training**

Training is a learning experience aimed at bringing about a relatively permanent change in an individual that will heighten the individual's ability to do the job (Nel, 2001b:467). According to Marx (1993:365) it comes down to a systematic process whereby employees can obtain knowledge, skills, attitudes and information needed to achieve the objectives of the organisation as well as personal objectives. Dransfield, et al. (1996:55) postulate that training fills the gap created between that which a person is able to do at a specific moment in time and what he/she is able to do after applicable training has been given.

- **Development**

To move the employee to a different state of functionality, development supports the employee in obtaining cultivated skills in order to handle future responsibilities, rather than merely the handling of the present job (Marx, 1993:365 and Armstrong, 1996:513). The development of staff in schools is mainly aimed at professional staff, but total staff development is, however, also essential. Educators, but also non-educators, do not enter the teaching profession as finished practitioners and therefore they should continuously be exposed to development (Castetter, 1971:259-260). By using staff development programmes at schools, staff should be led into viewing the learners of the school (as well as the parents) as customers and they should then be guided into how they should act towards their customers (Gray, 1991:145).

The development of educators should take place in regard to the development of knowledge and skills in accordance with the needs of the school. This can entail school-based and offsite workshops and courses and gives educators the opportunity to stand together and learn from one another. It can also be made applicable to school principals and could then include aspects like leadership and management development (MacGilchrist, Mortimore, Savage & Beresford, 1997:241-242). The career development of educators addresses changes to which educators are exposed during the course of their careers. It includes the following:

> job skills, knowledge and behaviour in regard to teaching methods, disciplinary techniques, curriculum lesson plans, prescriptions and procedures, and personal relationships with learners, colleagues and the community;

> attitudes, expectations and concerns in regard to the self and others, images of teaching, professional confidence and maturity, commitment to teaching and the satisfaction of beliefs and concerns;

> job events including changes in education in regard to a change in degree, interruption of service, the nature of professional responsibility, promotion and obtaining further qualifications (Burden, 1990:314).

The professional development of educators must therefore be seen as a deliberate and continuous process, which will include the identification and discussion of present and future needs of individual staff and is aimed at fulfilling their job satisfaction and career prospects. It also includes the needs of the school in regard to academic work and plans in the implementation of specific staff activities which are designed for harmonious satisfaction of needs (Bell & Day, 1991:4).

### 3.2.4  Purpose of staff development in schools

Cawood and Gibbon (1985:17) describe the aim of staff development in schools as the improvement of teaching in schools. Bishop (1976:15) further mentions that staff development is of critical importance as far as the provision of quality education is concerned. Educator development must be aimed at taking the educator into consideration in regard to needs that they may experience in their daily tasks and thereby a teaching corps will be created that will confer with one another regarding their educational task and develop one another in the process (Fullan & Hargreaves,

1992:5). In South Africa there are still many unqualified or underqualified educators and a concerted effort should be made to develop specifically educators in such a way that they are able to fulfil their educational task, are properly prepared and are able to manage a class (Lumby, 2003b:137).

Furthermore Heyns (1996:78) emphasises the important role that staff development plays in handling change in education. It is important that a school's staff is continuously exposed to political, economical and social changes that can influence quality education. In such a way effective teaching will be ensured. The teaching corps is exposed to policy changes that are forced on them on a daily basis by policy makers who do not always understand educators and their task and therefore it often happens that educators are expected to make changes that do not necessarily meet with their professional approval (Sikes, 1992:36-37). Staff development must ensure that educators use the latest teaching methods and aids, but also that educators are aware of new developments and changes in the broader spectrum of education (Dekker & Van Schalkwyk, 1995:20).

The objectives of staff development in schools are summarised by Cawood and Gibbon (1985:17), Prinsloo (2003c:216) and Middlewood (1997c:187) as follows:
- general educational development;
- heightened competence, improvement in present performance and the elimination of weaknesses with resultant effective teaching;
- professional growth of individuals;
- improvement in attitudes towards education;
- enhancement of job satisfaction;
- preparation of staff for changes regarding their duties and responsibilities;
- encouragement to apply new methods and techniques in their present situations;
- encouragement to act innovatively in their education task;
- personal development and fulfilment of educators;
- leadership development and identification of education leaders;
- team building and promoting of team spirit.

The following principles are critically important in regard to the management of staff development in schools:

- The process of staff development must be managed as a planned coherent strategy.
- It can be managed by one person or by a team.
- Staff development must be on the cards for all members of staff at the school.
- Individual and organisational needs must be approached in a balanced fashion.
- The staff must claim ownership of the process of staff development.
- A system during which needs identification, prioritising and analysis take place, must be established.
- Complete developmental options must be taken into consideration.
- The manner in which evaluation will take place must be agreed upon prior to the commencement of developmental activities.
- Evaluation of the process must establish the impact on individuals and the school in terms of teaching and learning (Lumby, 2003b:151).

From the above-mentioned objectives and principles of staff development it is very clear that the main purpose of staff development in schools is to improve education.

## 3.2.5 Training and development process

### 3.2.5.1 Introduction

The training and development process is described and diagnosed in literature by many authors. The training and development process is described by Werther and Davis (1989:267) as a transformation process by which an untrained employee is transformed into a competent employee, or a present employee may be given extra responsibility by means of training. For the purposes of this study the diagnostic representation of Griffen (1990:362) will be used. Theoretical supplement will, however, be done from various literature studies.

### 3.2.5.2  Training process

The training process is represented in Figure 3.1.

### Figure 3.1: Training process

```
                    ┌─────────────────────────────┐
                    │     Assess training needs    │
                    │                              │
                    │   Who need to be trained?    │
                    │  What do they need to know?  │
                    │  What do they already know?  │
                    └─────────────────────────────┘
                                   │
                                   ▼
                    ┌─────────────────────────────┐
                    │    Set training objectives   │
                    │                              │
                    │           Specific           │
                    │          Measurable          │
                    └─────────────────────────────┘
```

| Plan training evaluation | Develop training programme |
|---|---|
| *Did trainees like the training?* *Can they meet the training objectives?* *Do they perform better on the job?* | *Content        Location* *Methods        Trainers* *Duration* |

```
                    ┌─────────────────────────────┐
                    │       Conduct training       │
                    └─────────────────────────────┘
                                   │
                                   ▼
                    ┌─────────────────────────────┐
                    │       Evaluate training      │
                    └─────────────────────────────┘
                                   │
                                   ▼
                    ┌─────────────────────────────┐
                    │  Modify training programme   │
                    │    based on evaluation       │
                    └─────────────────────────────┘
```

(Griffen: 1990:362)

### 3.2.5.3  Assessment of training needs

Goodman (1972:18.3) sees training "as a very good mechanism at bringing about change by means of a systematic process of addressing problems and contributing to the achievement of the objectives of the organisation". The emphasis on training and

development is important, but greater emphasis should be placed on the needs within the organisation. Management and employees must identify these needs and investigate how they can be satisfied (Walker, 1996:436). A training need exists in an organisation where there is a gap between levels of present skills and knowledge of employers and the skills and knowledge that are needed or will be needed in future (Dalziel & Kenney, 1987:167). Before formal plans can be made in regard to training, training needs, and organisation's commitment in regard to training should be determined (Schneier, 1980:184). The forecasting of the needs of the organisations seems to be essential and results in the institution of training measures to stop the need from becoming a problem or crisis (Goodman, 1972:18.3).

The general approach in regard to the identification of training and development needs is identifying the organisation's present position and then determining the desired future position and by means of the development of human resources filling the gap (Klatt, et al., 1985:340). By means of needs assessment it is endeavoured to intercept future challenges (Werther & Davis, 1989:247).

The most important consideration with training and development is to ensure that training and development is truly needed and not only a desire (Walker, 1980:265 and Newell, 1980:194). Human resources planning demands that a training and development programme be developed that would facilitate the needs and that does not take on the form of the marketing of programmes within the organisation (Walker, 1980:265). The question that now arises, is: "Is there really a training problem and to what degree and of what importance?" (Goodman, 1972:18.8). Training must therefore address the true problem (Andrews, 1985:144).

Klatt, et al. (1985:340-342) identify ten techniques that can be used in identifying training needs.

- Interview with potential participants
- Questionnaire survey
- Analysis of personnel inventory files
- Management requests
- Observation of on-the-job behaviour
- Job analysis and job competences
- Tests

- Outside consultants
- Group problem analysis
- Assessment centres

### 3.2.5.4 Setting of training and development objectives

Training and development objectives must be formulated which will indicate what is expected of the employee after training has been completed, at which standards performance is going to be measured, as well as other circumstances (Carrell, et al., 2000:317 and Torrington & Chapman, 1979:119).

Educators are entrusted to the school principal and therefore the school principal must also develop the teaching and personal ability and skill of educators. This then serves as a prerequisite for effective teaching (Department of Education and Training (DET), 1990:28.1). The development of personnel development goals and objectives is necessary for the facilitation of the continuous changes to supply the needs of educators and Education Districts (Rebore, 1998:165).

### 3.2.5.5 Planning of training evaluation

The success of the training and development programme is determined by evaluating it against specific measures and evaluation criteria (Marx, 1993:367). Griffen (1990:362) asks the following questions to evaluate the training programme:

- Did the trainees enjoy the training?
- Did the trainees achieve training objectives?
- Did the trainees' job performance improve?

### 3.2.5.6 Development of a training programme

The description of the development of the training programme is done by means of the Griffen Model (1990:362) according to the following information: content, methods, duration, location and trainers.

### (a) Content

The content of training and development is determined by the needs assessment and the learning objectives (Klatt, et al., 1985:355). The content of the training programme must address the needs of the organisation and the employees. If the content does

not promote the objectives of the organisation, it would be a waste of funds. An important aspect regarding the content is that it should be relevant in regard to the needs of the different role players; otherwise the motivation in regard to learning may be too low (Werther & Davis, 1989:249). Training and development largely focuses on job competencies. The job must therefore be analysed to determine which skills are needed in successfully completing the job with the training content, which must be directly aimed at these skills that need to be developed. Training material must be chosen taking into consideration the type of work that needs to be done and should be focused on the specific job (Klatt, et al., 1985:355).

**(b)   Methods**

Training and development methods and techniques are divided into on-the-job training and off-the-job training by Marx (1993:368) and is shown in Figure 3.2.

**Figure 3.2  Methods of training and development**

```
                        ┌──────────────────────────────────┐
                        │   TRANING AND DEVELOPMENT         │
                        └──────────────────────────────────┘
           ┌────────────────────────┘          └────────────────────────┐
┌──────────────────────────────────┐      ┌──────────────────────────────────┐
│      On-the-job training          │      │      Off-the-job training         │
├──────────────────────────────────┤      ├──────────────────────────────────┤
│ Methods:                          │      │ Methods:                          │
│                                   │      │                                   │
│ • Job-instruction training        │      │ • Lectures                        │
│ • Job rotation                    │      │ • Video presentations             │
│ • Apprentice training             │      │ • Role-playing techniques         │
│ • Coaching techniques             │      │ • Behaviour modelling             │
│ • Multiple role methods           │      │ • Case studies                    │
│ • Sitting-by-me technique         │      │ • Simulation training             │
│ • Assistant method                │      │ • Self-study                      │
│ • Project method                  │      │ • Programmed learning             │
│                                   │      │ • Laboratory training             │
│                                   │      │ • Problem-solving method          │
│                                   │      │ • Leadership orientation          │
│                                   │      │ • Computer simulations            │
│                                   │      │ • Group discussions:              │
│                                   │      │   - Conference method             │
│                                   │      │   - Panel discussion              │
└──────────────────────────────────┘      └──────────────────────────────────┘
```

Marx (1993:368)

The methods of training and development according to Figure 3.2 can be used as guidelines for school principals to ensure training and development of staff.

**(c) Duration, location and trainers**

- The time frame of the training programme is important. A decision must be made whether training should be divided into short parts over a long time period or if intensive training should be given over a short time period (Andrews, 1985:145).

- Training and development methods can be applied when the employee is at his/her place of work or it can take place away from the work place (school) (Carrell, et al., 2000:318).

- Training can be done by training officials from within or outside of the organisation (school) (Andrews, 1985:145).

**(d) Conduct and evaluate training**

- During the process of training the trainer should ensure that the information communicated to the trainee is accepted by the trainee (Torrington & Chapman, 1979:128).

- Many organisations evade the evaluation of the training and evaluation process, because of the high cost and high degree of difficulty involved in evaluation, therefore the decision regarding evaluation of the training and development process should be taken at the start of the training and development process (Klatt, et al., 1985:364).

- By means of evaluation it should be determined if the training has achieved the set objectives; had there been, for instance, a change in productivity and quality or did the services render improvement (DuBrin & Ireland, 1993:254). If the presupposition had been that training is the only influencing factor, evaluation of training and development is therefore an indication of the success of the process if there was an improvement between job performance before and after training (Dunn & Stephens, 1972:198-199). The evaluation of training is seen by Mitchell (1974:429) as the only effort at collecting information (feedback) regarding the effect of training and the training is then assessed in the light of that information. As

funds in South Africa will most probably stay limited in future, all development activities should be monitored at an appropriate cost to ensure that they have the desired impact on individuals and the schools involved (Lumby, 2003b:146-147).

**(e)   Modify training programmes based on evaluation**

Through the training and evaluation process the evaluator can make the decision to adjust a programme or course, or to go ahead with it, or to improve it (Sherman & Bohlander, 1992:218).

## 3.2.6  Development activities of educators in schools

When development activities are applied to the school as organisation, the school principal must communicate with the educators and the total staff as a team with the aim of developing the educators' abilities, quality of teaching and achievement and output. In the course of this process the school principal must make use of deputy principals, heads of department, support services, learning area managers and departmental officials to develop the activities in educators mentioned below. These activities include the following:

- correcting incorrect behaviour
- giving direction and guidance
- improving and increasing knowledge
- skills training
- educating
- setting an example
- developing methodology
- demonstrating and indicating standards
- communicating
- inspiring and activating
- building a teaching team (Department of Education and Training, 1990:28.2).

The FSDoE has also developed a framework used to support schools in developing fully integrated school development plans. This includes the implementation of the following staff development programmes:

- empowerment of educators to implement OBE effectively;
- effective implementation of Developmental Appraisal System (DAS) replaced by IQMS;
- development of the abilities of educators to extend Mathematics, Science, History and the use of information technology in order to further educators' pedagogical skills.

The FSDoE claims that it will monitor the process and inter alia also concentrate on the following aspects affecting educators:
- level and implementation of OBE
- maximal use of teaching time
- school management and administration
- school leadership
- professional development of educators
- educator discipline
- compulsory attendance of educators
- understanding departmental goals and objectives
- effectively using resources
- school safety (Free State Department of Education, 2002c:1-3)

Middlewood and Lumby (1998:84); Middlewood (1997c:193); Cawood and Gibbon (1985:26-27) and Lumby (2003b:143-144) state that the following activities can play a big role in staff development programmes:
- staff-led workshops
- paired observations
- seminars, symposiums, panel discussions, demonstrations and workshops
- research projects
- visits and fieldtrips
- external and internal in-school short courses
- counselling, coaching and consultancy
- planned reading
- self-development, for example self-activity modules, programmed instruction, computer-based instructions

- change in responsibilities
- sitting in on meetings
- group activities, for example brainstorming, forum discussion groups, inter-group activities
- experienced-based methods, for example simulation, role play, case studies, advanced instructional games and laboratory learning
- attendance at degree/certificate/diploma programmes
- job enrichment schemes
- job rotation
- internal or external secondments
- mentorship

Educators can further be developed by:
- letting staff work together and learning from one another
- staff sharing strategies
- collaborative reporting
- weekly staff get-togethers
- making staff a part of a shared planning process (Cassar, 2003).

## 3.2.7 Skills Development Act, No 97 of 1998

The growth of the South African economy is being hindered because of inadequately skilled (educated) workers, which has a negative influence on productivity. As education and training are linked, these two aspects need to be integrated. The Skills Development Act aims at improving and developing the skills of all workers in South Africa (Department of Education, 2000b:63) (cf. 2.8.7.8).

### 3.2.7.1 Objective of the Skills Development Act

The objectives of the Act can be summarised as follows:
- the establishment of national, sectoral and workplace strategies to develop and improve the South African workforce;
- the integration of the above-mentioned strategies with the National Qualifications Framework as stated in the South African Qualifications Act of 1995;

- by making provision for learnerships that result in recognised occupational qualifications;
- the financing of skills development by a levy-grant scheme and the National Skills Fund;
- the provision and regulation of employment services;
- the provision of aspects regarding the Act (South African Management Development Institute, 2002d:17).

### 3.2.7.2  Purpose of the Skills Development Act

According to Section 2 of the Act the purposes of the Act are:
- developing the skills of the South African workforce;
- increasing investment in education and training in the labour market;
- encouraging employers to create opportunities for education and training in the workplace;
- encouraging workers to participate in learnership and other training programmes;
- providing employment for people who find it hard to obtain employment;
- ensuring that quality education and training that entail obtaining skills takes place in the workplace;
- supporting people in their quest to obtain employment, ensuring re-entry to the labour market for retrenched workers and helping employers obtain qualified employees;
- providing and regulating employment services (South African Management Development Institute, 2002d:17-19; Nel: 2001b:122-123 and Department of Education, 2000b:63-64).

The Act comes into play according to the following aspects:
- The National Skills Authority advises the Minister of Labour regarding the national skills development policy and the national skills development strategy and reports regarding the implementation thereof.
- The National Skills Fund is aimed at financing meaningful skills and occupational competence.

- The establishment of Sector Education and Training Authorities (SETA) that will act as intermediaries on education between the stakeholders in the economical sector and the Department of Labour.

- The establishment of the Skills Development Planning Unit and Labour Centres.

- The encouragement of partnerships between the private and public sectors to supply education and training in and for the workplace.

- Establishing cooperation with the South African Qualifications Authority (South African Management Development Institute, 2002b:18-28 and Kitching, 2003).

The charging of a skills development levy where the 1% skills levy is allocated as follows by the FSDoE:

- employees of the FSDoE

- potential employees of the FSDoE (Grade 12 learners)

- SGB members

- Members of representative council of learners

- ABET learners (Kitching, 2003).

The challenge for the school principal lies in studying the content of the Act and making use of the opportunities provided in it for education and training for the staff of the school.

## 3.2.8 Management development and training

Management development represents any planned action to improve the effectiveness of present or future managers. Management development can be described as the acquisition of cognitive knowledge as seen against interpersonal skills (DuBrin & Ireland, 1993:255). Management training is a process aimed at educating and training managers (Wright, 1974:258). Mumford (1987:201) further states that managers must be developed to meet the demands of their present jobs more effectively.

Traditionally the approach in regards to employee training and management showed vast differences, but also had much in common. The flattening of organisational

structures and the exclusion of mid-level management have dismantled the boarders between management and non-management. The focus has shifted from non-management receiving training for technically orientated skills and management development being aimed at developing the skills of present and future managers to a redesign of jobs to move greater responsibilities downward to the lowest levels in the organisation with specific skills being executed by non-management (Carrell, et al., 2000:308-309).

During the process of training and development of managers (school principals), the decision needs to be taken whether the process is aimed at the identification and training of potential managers, the training of managers for promotion or the improvement of present performance of managers. The emphasis of courses as training for managers has shifted to the design of training plans in a system of on-going objectives, an intervention by management trainers as on-the-job consultants who facilitate problems, situations or lack in management, and the use of workshops to approach problem situations practically and/or theoretically in discourse. Although the evaluation of management training is hard, the influence of management on training and development in terms of the impact thereof, is very important (Wright, 1974:258).

### 3.2.9 Development of school principals

Rebore (1998:171) suggests two types of programmes to supply in the developmental needs of school principals. This includes, firstly, traditional methods like workshops, conferences and seminars that focus on a specific topic and, secondly, it focuses on the acquisition of skills that would be helpful to school principals in the execution of their jobs and could lead to personal development. School Governing Bodies must invest in the development of school principals in order to empower school principals for their task. Successful schools will be determined in future by the measure to which school principals are empowered for their management task (Truter, 2003).

### 3.2.10 Concluding remarks

Training and development of educators and school principals have been neglected in the past and with the tremendous and drastic changes in education, school principals will have to make a determined effort at developing and training educators in such a

way that present tendencies and changes can be handled. The school principal's task of managing the training and development of educators has never been so critical. The development and training of support staff, which includes administrative, terrain and hostel staff, is being totally neglected and, in most cases, ignored (cf. Table 4.40). This aspect must also receive intensive attention from the school principal.

## 3.3  PERFORMANCE APPRAISAL

### 3.3.1  Introduction and definition

Performance appraisal (PA) is a process where the expected performance of employees is described and the actual performance is measured, evaluated and recorded. A comparison is then drawn between expected and actual performance with suitable feedback to the employee on the process (Bartol & Martin, 1991:421). It is a never-ending process of continuous evaluation that will measure the contribution of the employee to an organisation (French, 1974:54 and Fischbach, 1972:41.1). The achievement of groups can also be measured by PA (French, 1974:54). School principals have an important role to play because they have to keep their staff informed regarding their performance, but also have to convince staff that PA is fair and equitable by determining the way in which staff are presently functioning and how they should be encouraged and supported in achieving their full potential (Buchel, 1995:140).

PA is described by Fidler (1994:190-191) as a process during which an employee and supervisor come together to discuss work performance, with the focus in education on accountability, assessment and evaluation.  Various terminologies are used to describe staff appraisal in education, specifically for educators. This includes, amongst others, the following: performance appraisal, performance review, performance evaluation, staff review, staff reporting and educator appraisal and assessment (Fidler, 1988:2). Dunham (1995:94) and Riches (1997:25) indicate that by means of PA valuable opportunities can be created for the satisfaction of crucial organisational needs by:

- an assessment of present and past performances of staff and a forecast of future performance of each individual staff member;

- an overview of present and potential skills, resources and capabilities available for HRM to meet future and present challenges;
- the identification of training needs for staff development.

Feedback to the employee forms the basis for PA and the employee is informed regarding past and present job performance. This forms the basis of job performance in the future (Cascio, 1995:161), in other words, by PA it is determined how job performance can be improved (Donnelly, et al., 1992:470). By means of the systematic examination of an employee's successes and failures a judgement can be made on a person's suitability for promotion and training as well as his/her potential development (Bennett, 1991:434-435 and Beach, 1985:205).

PA affects both the organisation and the employees and it is important that both groups view PA as valuable, because it determines the success of the process. PA serves as a management information system for the organisation and as a feedback system for the employee (Haynes, 1980:130). Dessler (1981:301) states that PA enables the organisation to determine the success of employment, placing and motivation.

Griffen (1990:364) gives a simple description of PA as a formal assessment of how well the employee executes the job. PA therefore deals with people who obtain certain information about themselves and get to know themselves in order to function in such a way in the organisation that the organisation and they themselves can benefit from this (Newton & Findlay, 1998:130). PA therefore aims at ensuring greater organisational effectiveness for schools by means of individual performance. Organisational effectiveness in schools entails quality teaching (Middlewood, 1997b:169). Therefore it is important that PA is concerned with development in such a way that all staff who are appraised could do a job more advanced than what is appraised (Stewart, 1987:309).

Success in South African education depends to a great measure on the successful functioning of educators in the South African context. PA comes down to the measurement of individual performance in an organisational context, but it must be seen in the light of the appraisal of educator performance against the background of

the school's aspiration towards quality education and teaching (Middlewood, 2003b:121). Schools have staff employed by the Provincial Education Department and staff employed by the SGB(cf. 1.1.;2.8.9.3 & 2.8.9.6 c(ii)).  Staff normally consists of educators and non-educators who are appraised differently. For the purposes of this study educators and non-educators will be viewed separately and reference will be made to policy and prescriptions in regard to Departmental staff with the presupposition that appraisal must also be done for SGB appointments (cf. 7.4.3).

## 3.3.2  Objectives and uses of performance appraisal

For the purposes of this study the objectives of PA will be described under the headings of Evaluative objectives and Developmental objectives (Carrell, et al., 2000:260-261 and Novit, 1979:140-141).

### 3.3.2.1  Evaluative objectives

The past job performance of the employee is evaluated and this enables the organisation (school) to make employment decisions. By evaluating past performance financial compensation can be given to employees and decisions can be made regarding promotion, transfers, demotions and termination of service. It serves as a link between the productivity of employees and their expectations in regard to compensation that they are hoping to receive for their productivity (Walker, 1980:202; Halloran, 1983:365; Novit, 1979:140-141; Mathis & Jackson, 2000:384 and Carrell, et al., 2000:260-261).

### 3.3.2.2  Developmental objectives

It serves as a source of information and feedback, so that the employee can know what the organisation's management is thinking in terms of whether he/she is doing a good job or not, what the organisation expects of the employee, what the employee can expect from the organisation and which aspect of the employee's performance can be improved upon in future. The objective is therefore to address the employee's skills and motivation keeping in mind future performance (Walker, 1980:202; Halloran, 1983:365; Novit, 1979:140-141; Mathis & Jackson, 2000:384 and Carrell, et al., 2000:260-261).

### 3.3.2.3  General objectives and uses

The general objectives and uses are seen as a whole in conjunction with the two categories of objectives mentioned above(c.f. 3.3.2.1 & 3.3.2.2).

- The point of departure is to improve management of HR.
- Employees are supported in career development.
- Employees have the opportunity to discuss their performance and performance standards with their immediate seniors on a regular basis.
- Weaknesses and strengths of employees can be identified.
- Specific programmes can be suggested to help with job performance.
- Results of PA can be used in making decisions about future job assignments, promotion and compensation.
- Employees' performance can be compared to real results.
- The need and effectiveness of training programmes can be determined.
- Feedback from employees regarding compensation structures.
- PA results form the basis of management training and development.
- PA results form the basis of validation of predictors used in selection and placement processes.
- Test results are compared with PA to evaluate the assumption that test results forecast job performance.
- Check on quality of work in schools that are credible to the general public.
- Lead to improvements of learning experiences of learners.
- Greater job satisfaction for everyone working at schools.
- PA results are used for HR research (Sherman & Bohlander, 1992:271; Crane, 1979:369; DuBrin & Ireland, 1993:256; Klatt, et al., 1985:431; Beach, 1985:205-206; Cascio, 1993:275; Lundy & Cowling, 1996:289; Pursell, 1972:42.1 and Fidler & Cooper, 1988:introduction).

### 3.3.3  Methods used to appraise performance

The different methods that can be used in PA are portrayed in Figure 3.3. Combinations of appraisal methods can be used in an organisation and even for a specific job appraisal (Mathis & Jackson, 2000:393). School principals should use the various methods of PA and combinations thereof for both educators and non-educators to create a positive management opportunity within school management. A

greater view should be taken than merely the application of the Departmental policy as far as the management of PA in the school is concerned.

**Figure 3.3: Methods used for PA**

```
┌─────────────────────────────┐              ┌─────────────────────────────┐
│ Category Rating Methods     │              │ Comparative Methods         │
│  • Graphic Rating Scale     │              │  • Ranking                  │
│  • Checklist                │              │  • Forced Distribution      │
└─────────────────────────────┘              └─────────────────────────────┘
              │                                            │
              └──────────┐          ┌──────────────────────┘
                         ▼          ▼
                  ┌──────────────────────────────┐
                  │ Performance Appraisal Methods │
                  └──────────────────────────────┘
                         ▲          ▲
              ┌──────────┘          └──────────────────────┐
              │                                            │
┌─────────────────────────────┐              ┌─────────────────────────────┐
│ Behavioural/Objective Methods│             │ Narrative Methods           │
│  • Behavioural Rating Approaches│          │  • Critical Incident        │
│  • Management by Objectives (MBO)│         │  • Essay                    │
└─────────────────────────────┘              │  • Field Review             │
                                             └─────────────────────────────┘
```
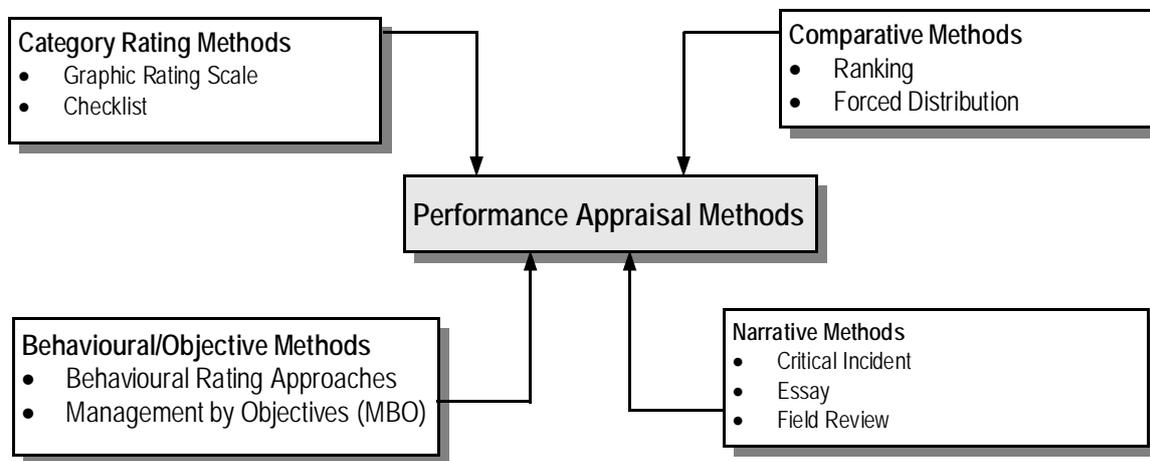
(Mathis & Jackson, 2000:393)

The methods used in PA as illustrated in Figure 3.3 are described as follows:

### 3.3.3.1 Category rating methods

### • Graphic rating scale

Graphic rating scales are also known as the conventional rating method (French, 1994:341). Employees are rated according to a certain standard or attribute of work. Traditionally it was aimed at personal traits, but presently the focus is placed on work behaviours and outcomes (Grobler, et al., 2002:270). This method is used most frequently, because of its simplicity (Mathis & Jackson, 2000:393). It is further very popular with managers because it can be filled in quickly and because very little training is needed in using it (Grobler, et al., 2002:270).

Grobler, et al. (2002:270) describe a non-graphic ratings scale that is much more valid as measuring instrument because there is a description of every mark, rather than a higher or lower mark on a scale. It gives a more accurate indication of an employee's behaviour in regard to a specific attribute because every level of the rating scale is described. It is a very easy and quick method for the use of managers.

- **Checklist**

A checklist makes use of statements or values in describing the behaviour of employees. Those statements or words best describing an employee's performance can be chosen from the checklist. Checklists can be modified by allocating weights to certain statements or words (Mathis & Jackson, 2000:395). These weights are based on the perceived importance of each item in regard to successful job performance (French, 1995:346). The weights are usually not known to the rater as the processing is handled by someone else.

### 3.3.3.2    Comparative methods

- **Ranking**

Ranking entails the listing of employees from the most effective to the least effective. Personnel are compared in relation to one another in reference to performance against one another. (Grobler, et al., 2002:270). This method is used the least of all methods of PA (French, 1994:347).

- **Forced distribution**

The ratings of staff are distributed along a bell-shaped curve (Mathis & Jackson, 2002:396). Staff is classified according to a scale that ranges from "poor" to "excellent" (Grobler, et al., 2002:275). The scale suggested by Mathis and Jackson (2002:396) ranges from "unsatisfactory" to "outstanding".

### 3.3.3.3    Narrative methods

- **Critical incidents**

These methods require that the appraiser keeps record of unusually favourable or unfavourable occurrences regarding the employee's work (Mathis & Jackson, 2000:397 and French, 1994:346). It calls for the manager compiling a list of critical incidents regarding the employee's performance for a total rating period (Mathis & Jackson, 2000:397). The use of critical incidents as appraisal method makes appraisal more job related, as specific examples of job behaviour are collected (Grobler, et al., 2002:276). This method can be used with great success in conjunction with other

appraisal methods, as it can supply documented reasons for a certain rating (Mathis & Jackson, 2000:397).

- **Essay**

The manager writes a free-form essay that describes employees' performance when linked to a number of broad categories (French, 1994:346).

- **Field review**

The field review concentrates on the person doing the evaluation rather than on the method to be followed. The reviewer, who can also be a person from the outside, interviews the manager about every employee's performance and the results of the interview are then converted into a rating for each employee (Mathis & Jackson, 2000:397).

### 3.3.3.4    Behaviour/Objective methods

- **Behaviour rating approaches**

Behaviour rating approaches assesses an employee's behaviours instead of other characteristics. The different behaviour approaches that can be used are as follows:

➢ Behaviourally anchored rating scales (BARS), which is a description of possible behaviour that the employee most commonly exhibits.

➢ Behaviour observation scales (BOS) show quite clear similarities to BARS, but the greatest difference is that behaviours are listed individually for each performance dimension and the result is that an individual is assessed for each behaviour.

➢ Behaviour expectation scales (BES) entail the exhibition of outstanding, average and unacceptable performance on a continuum (Mathis & Jackson, 2000:397-398 and French, 1994:347-348).

- **Management by Objectives (MBO)**

MBO specifies the performance goals that an individual wants to achieve with a certain time period and it entails an agreement between the manager and the employee regarding what the employee's objectives for the relevant time period are

going to be. MBO comprises measurable goal setting (Mathis & Jackson, 2000:399; French, 1994:349 and Grobler, et al., 2002:284).

## 3.3.4   Performance Appraisal of educators

### 3.3.4.1   Introduction

The goal of appraisal for educators is to assist educators to grow and develop professionally (Department of Education, 2000b:33). The Developmental Appraisal System (DAS) for educators is based on the principle of lifelong learning and development. The view is taken that priorities of certain areas of development and growth should take place throughout a teaching career (Free State Department of Education, s.a. f:4). As a point of departure reference will first be made to those factors that generally can play a determining role in the success of educator appraisal.

### 3.3.4.2  Factors influencing successful implementation of educator appraisal

The factors that can play a determining role in regard to the successful implementation of PA for educators are described as follows by Middlewood (2003b:125-127):

- **Clarity regarding the goal of the performance appraisal**

PA entails both accountability and development. Accountability represents a responsibility towards the learners of the school, the Education authorities and the community served by the school. PA must, however, also play a supportive role in the professional development of educators.

- **Ownership of the performance appraisal by the appraisee**

Educators place great value on their own opinion and perceptions of their performance, which in turn places great value on self-appraisal. This can be used as point of departure for PA, supported by information obtained by, for instance, class visits.

- **Trust in the process**

Mutual trust form the basis of an effective educator/school principal relationship and therefore any action undertaken, like PA, should not compromise this position of trust.

- **Consistency in the application of performance appraisal**

PA must be applied transparently and fairly, as well as consistently for all who are affected by the process.

- **Balance between confidentiality and sharing**

Because of the position of trust, PA is seen as confidential, but because PA must be measured and needs to be linked to the targets of the school's development plans, this confidentiality is compromised to a degree. It should, however, stay important that individual appraisal will contribute to the staff development programmes of the school.

- **Recognition of the need for both quantitative and qualitative measures**

Exact PA in the educational sector is not always possible as is the case in the business sector where quantitative and qualitative information is essential. It is still easier to measure financial problems against, for instance, innovation and customer care. In education it is also very difficult to apply PA in such an exact measure.

- **Evaluation and review of performance appraisal**

The consistent application of PA should be taken under investigation and it should be ascertained that it is in line with the school's strategy. The application and influence of PA in education is not easily achievable and it is viewed as a short term strategy towards improvement.

### 3.3.4.3 DAS according to ELRC Resolution 4 of 1998

DAS was implemented as from 1 January 1999 (Free State Department of Education (LTA 36/98), 1998:2). ELRC Resolution 4 of 1998 stipulates that all educators should be in possession of an appraisal report (Navalsig High School, 2000:2). DAS was based on the following continuous processes:

- reflective practice
- self-appraisal
- peer appraisal
- collaboration
- interaction with panels (Free State Department of Education: s.a. e:4)

The implementation of DAS according to ELRC Resolution 4 of 1998 was revoked on 29 September 2003 and it was announced that DAS, according to ELRC Collective Agreement Number 8 (Resolution 8) of 2003, must be implemented (Free State Department of Education, 2003e).

### 3.3.4.4 ELRC Resolution 8 of 2003

#### (a) Introduction

The purpose of this agreement is to align and to implement the various Quality Management Programmes (QMS) as an Integrated Quality Management System (IQMS) that includes the following:

- Developmental Appraisal
- Performance Measurement
- Whole School Evaluation

This agreement is applicable to all educators defined in the Employment of Educators Act, 1994, as amended (ELRC Resolution 8, 2003a).

#### (b)    Purpose of the programmes to enhance and monitor performance of the education system

The main objective for the Department of Education and for all educators is to ensure quality public education and to promote consistently the quality of learning and teaching, as this is the responsibility of the teaching profession towards the community.

The focus and purpose of these programmes are therefore as follows:

- **Developmental Appraisal (DA)**

The purpose of Developmental Appraisal is to appraise individual educators in a transparent manner in order to determine strengths and weaknesses and to formulate programmes for individual development.

- **Performance Measurement**

Performance Measurement aims at evaluating individual educators for the purposes of salary progression, grade progression, affirmation of appointments and rewards and incentives.

- **Whole School Evaluation (WSE)**

The purpose of WSE is to evaluate the overall effectiveness of the school, including the support of the education district in which the school has been placed, as well as school management, infrastructure, learning resources and the quality of teaching and learning. (ERLC Resolution 8, 2003a:3 and Free State Department of Education, 2004b:1).

DA and Performance Measurement are aimed at the individual educator, whereas WSE focuses on the school as a whole. The implementation of Performance measurements provides educators with the opportunity for salary progression, as DAS had no built-in financial compensation and was used as an internal evaluation and development document. After the DoE abandoned the achievement based system of salary progression in 1996 (Beeld, 26 Maart 2003:16), the new system of performance measurement filled this gap in order to determine salary progression and merit awards for educators (Sunday Times, 20 April 2003:3).

### (c) Features of the IQMS

The features of this model are as follows:

- DA and Performance Measurement inform and support each other without duplication of structures and procedures.
- DA and Performance Measurement covers a period of one calendar year.
- Internal WSE is supported and informed by DA and Performance Measurement.
- The separate purposes of DA, Performance Measurement and WSE remain intact.
- Structures already existing in schools include a School Management Team (SMT), Staff Development Team (SDT) and the Development Support Group (DSG).

- Self-evaluation by educators for DA and the school for WSE leads tot sustainability over the long term.

- Lines of accountability are very clear.

- The calendar year is divided by planning and preparation in the first term, followed by two development cycles in terms two and three and summative evaluations for the internal WSE.

- Summative evaluation must take place for the internal WSE although Performance Measurement must also be done in term four.

- External WSE can take place at any time during the year.

- WSE has additional Focus Areas, namely, Basic Functionality, Governance and Relationships, School Safety, Security and Discipline, School Infrastructure, Parents and Community (ELRC, Resolution 8, 2003a:4-5).


**(d) Guiding principles**

The alignment of the Quality Management System programmes is informed by the following principles:

- The recognition of the crucial role of the delivery of quality public education.

- All learners have equal access to quality education.

- The need for an Integrated Quality Management System, which is understood, credible, valued and used professionally.

- The system's focus is positive and constructive even when performance needs to improve.

- The system includes a process of self-evaluation and discussion of individual expectations.

- The need to minimise subjectivity through transparency and open discussion, and quality controls to ensure validity, reliability and relevance.

- The need to ensure fairness by affirming the rights of educators, for example there can be no sanctions against individual educators before meaningful development takes place.

- The system promotes individual professional growth of educators, and ongoing support for educators and the school.

- The system provides a clear protocol governing the interaction of the parties.

- The need for IQMS to provide for and encourage diversity in teaching styles.
- The system meets professional standards for sound quality management, including propriety (ethical and legal), utility (usable and effective), feasibility (practical, efficient and cost-effective), and accuracy.
- Development takes place within a national Human Resource Development strategy and Skills Development.
- The need for all schools to look for ways to improve continually.

### (e) Internal appraisals and evaluations of educators

For the purposes of this study, focus will only be placed on the internal appraisal and evaluation of educators. The following steps will be followed to observe an educator in the execution of his/her duties in regard to internal appraisals and evaluations:

- **Step 1:** The Regional/District/Area Manager and the school principal facilitate the establishment of the Quality Management Structures. This includes the SDT and the DSG.

- **Step 2:** Educators must do a self-evaluation before observation of educators can take place in practice.

- **Step 3:** Lesson observation of educators takes place for the purposes of DA, Performance Measurement and external WSE. The school principal, SMT and SDT in consultation with the staff develop a plan for the implementation of DA, Performance Measurement and external WSE. This implementation includes who have to be evaluated, by whom and when.

- **Step 4:** The DSG observes the lesson presentation of the educator by using the prescribed instrument and afterwards gives feedback to the observed educator regarding the outcomes.

- **Step 5:** The DSG makes information available to the SDT for the planning of SIP (ELRC, Resolution 8, 2003a:8).

**(f) Structures**

**(i)    School Development Team (SDT)**

- **Compilation of the SDT**
  - ➢ The SDT is made up of the school principal and other democratically elected members, including all or some of the SMT, but there must be post level representation.
  - ➢ The school itself determines the size of the SDT depending on the size of the school, number of educators and the work that has to be done.
  - ➢ The SDT is elected annually or for a determined term for the sake of continuity.

- **Role and responsibilities of the SDT**
  - ➢ Proper training in regard to staff development and processes of the IQMS.
  - ➢ Coordination of activity in regard to staff development.
  - ➢ Preparation and monitoring of IQMS management plan.
  - ➢ Guidance and facilitation of the compilation of the DSG.
  - ➢ Preparation of the final schedule of DSG members.
  - ➢ Links DA and SIP.
  - ➢ Liaison with the Education Department through the SMT regarding high priority needs.
  - ➢ Monitoring effectiveness of IQMS and reporting to relevant persons.
  - ➢ Record-keeping.
  - ➢ Overseeing mentoring and support by DSG's
  - ➢ Development of SIP in conjunction with SMT based on information obtained by means of DA.
  - ➢ Coordinating continuous support during the two cycles in terms two and three.
  - ➢ Completion of documentation regarding Performance Measurement.
  - ➢ Resolution of differences between educators and their DSG's.
  - ➢ Supplying necessary documentation to the school principal for presentation to the education district office.
  - ➢ Coordinating internal WSE process.

- ➤ Liases with external WSE team and SMT to coordinate and manage external WSE.
- ➤ Ensure that IQMS is applied consistently.

## (ii) Development Support Group (DSG)

- **Composition of DSG**

For every educator a separate DSG is compiled, consisting of:
- ➤ the immediate senior of the educator;
- ➤ some or other educator (peer) as appointed by the appraisee in regard to a specific learning area or school phase;
- ➤ additional representation if the appraisee (educator) chooses this option.

- **Roles and responsibilities of the DSG**
- ➤ main purpose is mentoring and support;
- ➤ assisting educators in developing a Personal Growth Plan (PGP);
- ➤ combining efforts with SDT to incorporate plans to develop educators according to SIP;
- ➤ being responsible for baseline evaluation of educator for development purposes;
- ➤ immediate senior of educator is responsible for summative evaluation at the end of the year for Performance Measurement;
- ➤ verifying information provided for Performance Measurement.

## (g) Records and documentation

### (i) Personal Growth Plan (PGP)
- ➤ Outcome of the Strategic Plan of the FSDoE.
- ➤ Educator in consultation with DSG develops it.
- ➤ Serves as a basis of information for the SIP that will serve as a source of information for the Education District in order to make their planning and development of support staff possible.
- ➤ Together with self-evaluation, baseline evaluation and Performance Measurement the PGP forms a very important record of needs and progress of individual educators.

**(ii)    School Improvement Plan (SIP)**

➢    Provides the school with the opportunity to monitor its own progress by means of self-evaluation.

➢    It happens on a continuous basis throughout the years between the cyclical external WSE.

➢    Is compiled by SDT and SMT and presented to Education District.

➢    SMT and SDT use the SIP to monitor progress.

➢    SIP must be linked to strategic planning of the Education Department (Free State Department of Education, 2004b:3-14).

**(h) Summary**

ELRC Resolution 8, of 2003 introduces a new process in which school principals will have to undergo thorough training. The success of IQMS will depend largely on the way in which it will be sold to educators, although the implementation of Performance Measurement should create a definite positive point of departure. IQMS is, however, not seen as an answer in preventing educators from exchanging Departmental service for private school employment. The 1% that an educator will receive, has not generally been accepted in a positive light, as it will take educators too long (16 years) to reach the top notch (Mercury, 16 May 2003:2).

## 3.3.5    Performance Appraisal for non-educators

### 3.3.5.1    Introduction

PA is suggested for officials whose performance is higher than the set norm. The PA must therefore be based on the performance of the appraisee. The supervisor must submit the following documentation to the Preliminary Committee so that a decision regarding PA for a person can be taken:

•    duty sheet;

•    a report containing reasons and examples why the person is recommended for PA.

PA for non-educators is also based on the principle that PA is a privilege and not a right of an employee (Free State Department of Education: 2001a:2-5). On 1 April 2003 this system was replaced by a Pay Progression system whereby PA is

dependant on the principle of performance during a specified period of time (Free State Department of Education, 2003g:s.a.)

Non-educators can also receive merit awards above and beyond PA. The goal of these merit awards is to give specific recognition within a specified range to non-educators who are producing exceptional work (Free State Department of Education, 2003b:1-2).

### 3.3.5.2 Performance Management and Development System for Public Servants

**(a) Goal**

Performance Management and Development in the Free State Province aims at bringing about organisational goal achievement and improving the rendering of service by means of the optimising of individual performance and achievement (Free State Department of Education, 2003f:3).

**(b) Objectives**

The objectives of the Performance Management and Development System (PMDS) are as follows:

- establishing a performance and learning culture in the Public Service;
- ensuring that jobholders know what is expected of them;
- bringing about interaction between jobholders and supervisors regarding performance;
- identifying and managing the developmental needs of jobholders and, where possible, involvement in the realisation of such needs;
- establishing fair and objective performance evaluation;
- rewarding good performance;
- improving service provision (Free State Department of Education, 2003f:3).

**(c) Principles**

According to the PMDS the management of performance occurs as follows:

- by a designated supervisor;
- in a constructive, supportive and non-discriminatory manner;
- improving service provision and effectiveness;
- decreasing the administrative load on supervisors;

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- stimulating skills development;

- bringing Departmental objectives and strategic plans in line with regard to performance;

- creating two-way feedback;

- establishing a well-planned feedback process;

- bringing assessments in line with core competencies and set criteria;

- having built-in equity and fairness (Free State Department of Education, 2003f:3-4).

## (d) Conclusion

The PMDS is applicable to all public servants appointed in accordance with the Public Service Act in the FSDoE. This system is used to make informed decisions on probations, rewards, promotions and skills development of jobholders (Free State Department of Education, 2003f:4).

## 3.3.6 Responsibility for conducting performance appraisal

PA can be done by a variety of people with the focus on flexibility and feedback (Mullins 1999:697). The following parties are involved in performance appraisal:

### 3.3.6.1 Senior management

Mullins (1999:697) is of the opinion that PA can be managed by senior management in the school, because it strengthens communication with employees and excludes the personal opinions of supervisors. Mathis and Jackson (2000:388) feel that senior management should only study and approve the final PA, while Caldwell (1972:43-14) excludes the involvement of senior management because senior management does not work sufficiently with the employee to be able to make a judgment.

### 3.3.6.2 Immediate supervisor

Nearly all literature sees the immediate supervisor as a logical person to do the PA, with Mathis and Jackson (2000:388) stating that the immediate supervisor is able to judge the employee's job performance realistically, objectively and fairly.

### 3.3.6.3 Peers

If the employees are working in a non-competitive group situation, peers are in the best position to be able to asses a co-worker's job performance, because peers are

able to supply firsthand information (Carrell, et al., 2000:290 and Beach, 1985:208). Mutual trust and co-operation is important for successful peer appraisal (Novit, 1979:149).

### 3.3.6.4  Subordinates

Evaluation by subordinates is also known as reverse appraisals (Carrell, et al., 2000:291 and Schultz, 2001f:522) or inverted appraisal (Crane, 1979:370). Subordinates are in a very favourable position to evaluate supervisors and managers, because they have much contact with them (Sherman & Bohlander, 19992:273).

Appraisal by subordinates is largely used for the development of supervisors and managers (Cascio, 1995:291). It also gives a good indication to supervisors and managers as to how they are viewed by their subordinates (Sherman & Bohlander, 1992:273). The success of this method of appraisal is dependent on the respect and transparency present within the organisation (Cascio, 1995:291 and Schultz, 2001f:522). It must, however, be handled with care, because the supervisor or manager may feel threatened by this and the subordinate may also feel threatened in doing it (Novit, 1979:149). It works well in big organisations where anonymity is ensured (Schultz, 2001f:522).

### 3.3.6.5  Self-appraisal

This is a very good self-development technique where the employees themselves identify strengths and weaknesses and develop their own goals (Mathis & Jackson, 2000:391). It is also very useful if the effort is made to get the employee more and more involved in the process (Sherman & Bohlander, 1992:271).

### 3.3.6.6  Customer or client

Internal or external customers or clients can be used, but it can only be seen as a supplication because it cannot be a complete appraisal (Schultz, 2001f:522 and Carrell, et al., 2000:290).

### 3.3.6.7  Team

Team-appraisal is undertaken dually with the evaluation of every member of the group whose job performance is evaluated. The group as a whole is also evaluated to determine if the set goals have been achieved (Schultz, 2001f:523). Teams are used

to establish compliancy within the organisation. Assignments can be rotated within the group with the result that the group is evaluated as a whole and also rewarded as such (Cherrington, 1995:300).

### 3.3.6.8 Computerized performance appraisals

Using certain kinds of software, supervisors and managers are able to keep log notes in order to evaluate job performance (Cascio, 1995:201 and Schultz, 2001f:522).

### 3.3.6.9 Multi-source rating

Multi-source rating is also known as 360° appraisal (Schultz, 2001f:522). A team evaluates the job performance of an employee (Carrell, et al., 2000:292). This team can consist of supervisors or managers, subordinates, peers, internal and external customers and clients and the employee, who can then complete questionnaires (Schultz, 2001f:522). The supervisor or manager handles the feedback and this is very useful for the PA of an employee with a wide field of work (Mathis & Jackson, 2000:392 and Schultz, 2001f:523).

### 3.3.6.10 Rating committees

The employee's supervisor and other supervisors form a committee where each evaluates an aspect of the employee's job. This has the benefit that it excludes bias and the job performance is evaluated from different angles (Dessler, 1981:314-315).

## 3.3.7 Role of the school principal in the effective management of Performance Appraisal

School principals are faced with the challenge that mistrust in regard to PA needs to be removed in order to ensure an effective implementation of PA. The school principal must make sure that any system during which performance is examined or appraised is run in such a way that the process proceeds procedurally correct and that consistency is the order of the day. It must also be endeavoured to bring about a value system within the school that falls within the stipulations of the regulations to ensure ownership of this process in the school.

Although school principals in South Africa are confronted by similar problems in regard to PA as are experienced in the education systems of other countries, the school principal is still the only person that can sell PA to the staff of a school as

acceptable. The functioning of PA must take place against the background of trust. The school principal can ensure that PA is managed successfully within the school by viewing it as an integral part of the school's management approach in regard to HRM, which also includes recruitment, selection, induction and the day-to-day management of the school (Middlewood, 2003b:131-133).

## 3.3.8 Performance appraisal (PA) interview

### 3.3.8.1 Introduction

Eighty percent (80%) of all employees attend a PA interview with the conviction that their performance was above average, while research has shown that, although it is possible for all employees to perform above the expected average, only fifty percent (50%) of employees in a big organisation perform above average. Therefore the PA interview is a challenging situation for any manager (Bartol & Martin, 1991:423).

The PA interview provides the manager with the opportunity to discuss the employee's performance record with him/her and to investigate possible improvement in performance and growth (Sherman & Bohlander, 1992:291). The feedback must be focused on the employee's job performance and not on the employee (Werther & Davis, 1989:326).

### 3.3.8.2 Types of performance appraisal interviews

Sherman and Bohlander (1992:393 & 291) and Werther and Davis (1989:326) discuss the following types of performance appraisal interviews:

- **Tell-and-sell method**

The employee's job performance is reviewed during the interview and the effort is made to convince the employee to aim for better performance and to adjust present action in order to improve job performance.

- **Tell-and-listen method**

Strengths and weaknesses of the employee's job performance are illustrated to the employee during the first part of the interview. During the second half of the interview the employee can furnish reasons or explanations about specific job performance.

- **Problem-solving method**

Problems that interfere with job performance are indicated in order to bring about growth and development.

A combination of interviews can be used, depending on the subject under discussion and the approach of the manager. The interview is seen as the most important part of the PA, and it must therefore be handled in such a way that communication is set up with employees and the employees are given the opportunity to reveal their own feelings.

## 3.3.9 Performance management

### 3.3.9.1 Process of performance management

Performance management (PM) builds on PA rather than replacing it. PA is seen by Harrison (1994:253) as an essential characteristic (one of many) of PM. PM focuses on the management of the employee's performance instead of on PA by itself (Schultz, 2001f:516). PM makes use of all management tools, including PA, to ensure the realisation of performance goals. Examples of such tools include compensation systems, job design, leadership and training. These tools are viewed in conjunction with PA as a performance approach (Carrell, et al., 2000:258). PM is defined by Redman and Dickinson (1990:1) as a data-guided approach to managing work behaviour. It entails a process starting with the setting of targets and is supplied with regular mentoring and coaching (Middlewood, 1997b:170). PM therefore uses PA as a point of departure for the determination of targets and the making of range statements that has employee performance as goal (Harrison, 1993:254). According to Harrison (1993:255) PM is a process that is aimed at ensuring that HR strategies underwrites the policy direction of the organisation, because it serves as a basis for the evaluation and improvement of individual and organisational performance as seen against previously stated organisational strategies and objectives. Mathis and Jackson (2000:380) state that PM is made up of processes used for the identification, encouragement, measurement, evaluation and compensation of employee performance. This intertwined processes of work, development and compensation is viewed as fundamental aspects of HRM (Armstrong, 1996:233). PM can therefore be seen as a systematic process which has as its goal to bring about better results by managing performance and it should be viewed against the background of planned

goals, objectives and standards (South African Management Development Institute, 2002a:204).

### 3.3.9.2  Characteristics and objectives of performance management

The process of PM seems to be in place, if the following requirements are met (Harrison, 1993:253; Lundy & Cowling, 1996:307 and Schultz, 2001f:517):

- Communicating the objectives of the mission statement of the organisation to the employee with the viewing thereof as a partial vision.
- Setting individual performance targets that are related to the organisation's objectives.
- Having a formal review of the process to determine if there is progress towards the realisation of the stated targets.
- Having a review process to identify training, development and compensation outcomes.
- Evaluating the effectiveness of the whole process and identifying the contribution of the organisation's performance.
- Career planning and counselling of employees.

The goal of PM is performance improvement (Harrison, 1994:259). The improved results of the individual employees and the organisation as a whole takes place against the background of the management and understanding of performance in a framework of planned goals, standards and capability requirements (Armstrong, 1996:232).

It aims at the implementation of strategic goals on lower levels in the organisation (Carrell, et al., 2000:258). This shared vision to make every employee part of the aims and purpose of the organisation allows employees the ability to identify their contribution in the performance of the organisation (Armstrong, 1996:235).

Schultz (2001f:516) summarizes the goal of PM in the following way:

- It is a process of strategic implementation.
- Leads to cultural change.
- Provides input in other human resources systems like development and compensation.

PM is a future-directed process that includes management and employees to ensure improved performance. It forms the basis of regular discussion amongst management, employees or groups regarding performance and development needs. Emphasis is therefore placed on individual, as well as group performance and development (Armstrong, 1996:235).

## 3.4  COMPENSATION MANAGEMENT

### 3.4.1  Introduction and definitions

Compensation is a very important reason why people work for a certain organisation and the compensation must satisfy both the employer and the employee (Mathis & Jackson, 2000:416 and Mullins, 1999:171).   It can therefore be stated that the compensation of employees plays a key role in the relationship between employer and employee and must be viewed as critically important by both (Gerhart, Minkoff & Olsen, 1996:258).

Compensation is described slightly differently by various sources of literature, but the literature agrees that it has to do with the compensation of people (employees). Griffen (1990:368) and Werther and Davis (1989:338) describe compensation as a financial payment for work completed or services rendered, with Bartol and Martin (1991:424); Stone (1982:347) and Schultz (2001e:281) viewing compensation not as only cash values, but also adding indirect compensation in non-cash value, like leave taken in illness or on holiday, medical funds, pension. French (1974:463) adds that the sub-processes that make up compensation also include the motivation of employees to maintain certain levels of performance.

Carrell, et al. (1999:370) give a very complete description of compensation that includes extrinsic rewards like salaries, loans and certain benefits, but also intrinsic rewards like achieving personal goals, autonomy and challenging job opportunities.

### 3.4.2  Composition of compensation package

The compensation of employees, as deduced from the previous discussion, is made up of financial (extrinsic) and non-financial (intrinsic) compensation. This total compensation package must be structured in such a way that an employee is able to

maintain a realistic standard of living and can make provision for the future (Marx, 1993:370). Refer to Figure 3.4 as an example of a compensation package.

**Figure 3.4  Composition of the compensation package**



COMPENSATION PACKAGE

**Financial rewards (extrinsic)**

Monetary reward
- Salaries
- Wages
- Bonuses
- Commissions
- Pay incentives

Benefits
- Pension
- Medical aid
- Insurance
- Unemployment insurance
- Recreation
- Vacation
- Paid public days
- Sick leave
- Housing subsidies
- Motor car subsidies
- Subsidized meals
- Retirement benefits
- Bursaries

Job
- Interesting work
- Challenging work
- Responsibility
- Recognition
- Promotion opportunities

Job environment
- Sound policy
- Developmental supervision
- Socialization with colleagues
- Pleasant working environment
- Status symbols
- Safe working conditions

**Non-financial rewards (intrinsic)**

COMPOSITION

(Carrell, et al., 2000:371 and Marx, 1993:370)

### 3.4.3  Effect of compensation on motivation

Job performance based on rewards in terms of payment results in the fact that the repetition or achievement of a certain job performance will not take place without the reward. It is, however, not applicable to a school situation, because the teaching and education of learners is the top priority for educators giving their best and because they have a certain status as educators. The effect of payment in education is, however, present, if strikes and demands for better payment are taken into consideration. The relationship between money and motivation does have a general influence on job performance (Rebore, 1998:235). Education is not excluded from this, but the ethical restraint of educators should not influence their job performance. This also places strain on the school principal as HR manager to ensure that the teaching and education of learners are given preference above the influence of payment of the educator.

## 3.5  MOTIVATION

### 3.5.1  Introduction

Motivation of staff is an important question with which school principals are confronted (Kruger, 2003c:251). The school principal as leader must have the ability to motivate staff (De Wet, 1980:188). By means of motivation the school principal tries to make the staff work according to their abilities and the achievement of the established goals (Bernard, 1981:47). The school principal must therefore be focused on that which will motivate the staff and must make provision for it in the normal daily management of the school (Brazelle, s.a.:5). School principals must always consider the fact that when a person executes a task because he/she enjoys it, that person is motivated, but then the content of the task must be measured by the work. The key aspect in the motivation of subordinates is to make their tasks as pleasant as possible, so that they will be keen in doing it (Mol, 1990:40-41). There should, therefore, be encouragement of subordinates so that they will work more enthusiastically (Bell, 1992:37). The school principal as motivator of the educators of a school should always be aware of the human spirit of educators as a determining factor, because educators are usually self-motivated and will always get on with the job, no matter what the circumstances (Lumby, 2003c:155).

## 3.5.2  Definition

Motivation is directly influenced by the strength of motives (Hersey & Blanchard, 1982:15). Motives are defined as an action to satisfy a need (Beach, 1985:295), while Hersey and Blanchard (1982:15) see a motive as the needs, wants and drives or impulses within an individual aimed at certain goals, which may be conscious or subconscious.

Werther and Davis (1989:448) define motivation as a person's drive to take voluntary action. Bennett (1991:339) sees it as the end of needs, drives and aspirations that determine behaviour. French (1974:91) describes motivation as the inclination to go into action in order to achieve certain outcomes based on a specified need and the expectation that it will be achieved.

Motivated action is aimed at lessening the gap between an individual's present mindset and the desired mindset and at mobilizing the employee's behaviour at having sustained interest in achieving the goals of the organisation (Stone, 1974:272 and DuBrin & Ireland, 1993:294).

Chruden and Sherman (1984:257) state that motivational literature does not always accurately describe motivation and further states that, by analysing the different viewpoints, three factors are clear:

- What causes certain behaviour?
- What steers behaviour in a specific direction?
- How can this behaviour be sustained?

Mullins (1999:414) holds the opinion that people should not be motivated, but rather provided with the environment, so that they could be self-motivated, because motivation is still a personal decision. If people are pressurised into acting in a specific way, their reaction will be based on pressure. They therefore react because they have to, but if they are motivated by the choice made because it is seen as important, certain outcomes will be achieved based on a specified need and the expectation that it will be achieved. Armstrong (1996:293) states that, by means of motivation, people will show specific behaviour which will lead to the achievement of goals resulting in a

valued reward and eventually leading to the satisfaction of a need, with employees motivated by their needs.

### 3.5.3   Role of management regarding motivation

Gellerman (1972:2.1) maintains that the management of organisations are much more focused on motivation, because the pressure exists to improve the productivity of employees and because productivity could be linked to the willingness of employees to give their best. Motivation therefore comes down to the management of an organisation's action to heighten employees' willingness to give their best and to convince employees to give their best voluntarily (De Villiers & Gous, 1993:289; Du Toit & Marx, 1981:253 and Kroon, 1995:12).

The management of an organisation's effectiveness is influenced by the ability to motivate, lead successfully and communicate (Du Toit, 1995:327). Although motivation should come from the employees themselves, management should encourage it (Du Toit & Marx, 1981:253). Management should also have an understanding of human behaviour in order to influence its employees in terms of specified behaviour (Du Toit, 1995:39). It should be ascertained at the earliest possible stage what would motivate employees and it should then be applied in the best way possible in order to motivate employees (Kroon, 1995:12) Motivation is immeasurably valuable for the management of an organisation, because they would like employees to perform on an acceptable level so that the manager would be motivated to perform well and to motivate people to join the organisation (Donnelly, et al., 1992:308).

Lumby (2003c:167) states that school principals can approach motivation in the school's organisational setting in the following ways:
- variables that are unique to individuals, like attitudes, interests and specific needs;
- variables that result from the nature of the job, like the level of control over the job and the level of responsibility;
- variables that can be linked directly to the school's organisational circumstances, like peer group relations, supervisory practices, reward and organisational climate.

School principals and other staff who are employed in management posts in schools must therefore be focused on those factors that can act as motivation for every individual in the school's staff and must endeavour to address the motivational needs of staff. These can include, amongst others, the following:

- maintaining good relations with learners, colleagues and parents;
- involving staff through decision-making and policy-making of the school;
- providing opportunity to develop skills.

These intrinsic rewards indicate a direct correlation with education and will lead to the fact that extrinsic factors like pay and conditions do not determine the motivation of staff in schools. School principals can create a foundation for motivation by means of teamwork and solidarity (Lumby, 2003c:167-168).

### 3.5.4  Motivational influence on job performance

Motivation directly influences job performance (Griffen, 1990:437). Management therefore has to try and identify the needs of the employees and provide therein, resulting in higher job performance (Lundy & Cowling, 1996:198).

According to Cascio (1986:398-400) management can take three steps in motivating employees and thereby improving job performance.

- **Define performance**

The employee must be orientated in regard to job performance and must have precise knowledge of what the job entails and should have specified goal settings.

- **Facilitate performance**

Stumbling blocks that influence job performance should be removed, the necessary means to performance should be provided, and the right employees should be selected.

- **Encourage performance**

The value, timing, justification and the probability of rewards are of importance here.

By applying employees according to their full potential quality products and services can be provided (Schultz, 2001b:236). Making employees part of the organisation in terms of giving them a say in goals, resources and processes can result in commitment to the organisational goals, which could further motivate and satisfy employees, leading to an improvement in the individual's goal achievement and an eventual improvement in the position of the organisation (Bratton, 1999c:305).

Low performance should not necessarily be connected to low motivation, as there could also be influencing by external factors, like a lack of resources or skills (Donnelly, et al., 1992:308). Job performance is determined by competencies, motivation and the surroundings, in other words: how and what to do, the will to do it and with what it should be done. These three factors influence one another reciprocally (Smit & Cronjé, 1992:323).

### 3.5.5  Motivation and job satisfaction

In certain circles motivation and job satisfaction are seen as synonymous (Lumby, 2003c:157). Pii (2003:19) does not view motivation and job satisfaction as being synonymous. The view of motivation and job satisfaction as being synonymous can, however, lead to the following misleading conclusions:

- staff who are satisfied, are motivated;
- staff who are satisfied, work harder;
- measures of satisfaction are equivalent to measures of motivation.

(Lumby, 2003c:157).

Byars and Rue (1994:323) describe motivation as a driving force to perform and refers to job satisfaction as an indication of an employee's attitude of happiness within a job situation. This view indicates that motivation and job satisfaction are related, rather than being viewed as being similar. It is, however, of the utmost importance that school principals, in order to motivate their staff, have an in-depth knowledge of motivation and the ability to judge the relationship between motivation and job satisfaction (Lumby, 2003c:157).

### 3.5.6  Motivational theories

Using Cameron's generally accepted approach, Cope (1979:58) categorises motivational theories into three broad groups, namely:

- Discrepancy theories:  These include the content theories of Hertzberg, Maslow and McClelland.

- Expectancy theories:  These include Vroom's Expectancy Theory, Gergen's Exchange Theory and Wolf's Need Gratification Theory.

- Equity Theories:  These include the theories of Adams, Bersheid and Walster, Latham and Locke and Hull.

For the purpose of this study the Motivation-hygiene theory of Hertzberg will be sufficient because of its practical value for the school situation.

## 3.5.7  Hertzberg motivation-hygiene theory

Hertzberg postulates that the employees are satisfied or dissatisfied by two separate sets of factors known as motivation factors and hygiene factors (Brazelle, s.a.:5-6). Hertzberg and his associates made use of a critical-incidents procedure by means of interviewing people and asking them to describe occurrences in their workplace that made their job satisfaction increase or decrease (Hoy & Miskel, 1987:182).

### 3.5.7.1  Motivation factors

Motivation factors are also described by Van der Westhuizen (1990) as intrinsic factors that motivate employees towards better performance, with Brazelle (s.a.:5) stating that employees are made happy and satisfied by motivation factors, which then lead to better motivation.

Motivation factors include the following:
- achievement
- recognition
- challenging work
- responsibility
- advancement (Brazelle, s.a.:5; Hoy & Miskel, 1987:182; Silver, 1983:299 and Van der Westhuizen, 1990:208).

The above-mentioned factors have to do with the work itself (Van der Westhuizen, 1990:208). The absence thereof does not necessarily lead to a feeling of dissatisfaction amongst employees (Silver, 1983:299 and Brazelle, s.a.:5-6), but rather an absence of job satisfaction (Brazelle, s.a.:6).

### 3.5.7.2 Hygiene factors

Van der Westhuizen (1990:209) describes hygiene factors as nurturing factors, demotivators or external factors. Silver (1983:299) states that hygiene factors relate to the context within which work is done.

Hygiene factors include the following:

- organisational policy and administration
- supervision
- compensation
- interpersonal relationships
- working conditions
- job security
- influence on personal life
- status (Silver, 1983:300; Van der Westhuizen, 1990:209; Brazelle, s.a.:6 and Hoy & Miskel, 1987:183).

The presence of hygiene factors leads to the combating of work dissatisfaction (Van der Westhuizen, 1990:209 and Hoy & Miskel 1987:184). To a degree, it can also improve performance (Hoy & Miskel, 1987:184). These factors are a source of dissatisfaction if the employees are dissatisfied with their work (Brazelle, s.a.:6 and Silver, 1983:300).

### 3.5.7.3 Influence of Hertzberg's theory on school principals

Van der Westhuizen (1990:209-210) is of the opinion that a school principal should be aware of the important influence that hygiene factors have on educators in their strive towards job satisfaction. The achievement of job satisfaction by means of the presence of the hygiene factors could then lead to the encouragement of educators towards better service and greater personal actualisation by means of the motivation factors. Brazelle (s.a.:6) states that, although the school principal does not have

control over all hygiene factors, the positive application of those factors that are influenced by the school principal could limit or diminish dissatisfaction.

On the other hand, positive motivation can be accompanied by applying the following motivation principles:

- Participation of employees in regard to decision-making and matters directly related to them.
- Communicating information regarding goals and results to employees.
- Recognition and job satisfaction lead to harder-working employees.
- Delegating authority to competent employees (Van der Westhuizen, 1990:211-212).

## 3.5.8  Motivation of South African educators

School principals in the Free State Province do not only see motivation as their most important task, but also as that HRM task in which the greatest training need is found (cf. Table 5.1). The deduction that can be made from the present research is that school principals in the Free State Province are concerned about the motivational levels of their staff and their ability to manage motivation of staff.

Although school principals in the former Republic of Bophutatswana place motivation on such a low level as 14th or 15th on their list of problems that they have to address, a possible question mark can be placed against the motivation of educators in South Africa (Lumby, 2003c:155 & 165). Educators in South Africa are confronted with situations like threatening attitudes of learners, vandalism in schools (that takes a long time to repair), learners who are undernourished and hungry; the experience of especially black educators that there is a deterioration in the culture of learning in schools, bad discipline of learners in schools, parents who do not cooperate with schools in terms of the exercising of discipline and insufficient support from education authorities in dealing with transgressors (Lumby, 2003c:155 and Rapport, 5 Oktober 2003:19).

The circumstances in schools therefore have a definite influence on the motivation of educators, but educators are also bringing about their own circumstances. A study indicated that the motivational levels of educators went down with 24% between 1990

to 1995, with 68% of educators and 88% of school principals considering leaving the educational field. That there has been a lowering in the status of educators is clearly observable. The question is why this happened. It is possible that the answers can be found in the fact that educator absenteeism, drunkenness and low levels of motivation are self-evident (Lumby, 2003c:162 & 155). These remarks can further be emphasised by statistics from the FSDoE. In 2002/2003 81 disciplinary hearings were held for educators, resulting in 2 warnings, 45 final warnings and 26 cases of dismissal (5 educators were found innocent and in 3 cases the case was withdrawn). The charges were varied and included having sexual relations with learners, abuse or assault, rape, sexual harassment, absenteeism, fraud, corporal punishment, using derogatory language, misappropriation of school funds, dereliction of duty and theft (Volksblad, 6 November 2003:5). These are only official statistics. The statistics of informal action taken within schools are unknown, but should make for interesting reading. Career uncertainty also plays a major role and these are all aspects that would place the motivation of educators in South Africa under suspicion.

School principals have a great task and responsibility in getting their staff motivation to such a level that professional and effective teaching will generally take place.

## 3.6   QUALITY OF WORK LIFE

### 3.6.1   Introduction

Quality of work life (QWL) has to do with the way that employees' needs are addressed by the organisation for which they work (Carrell, et al., 2000:27). It indicates an organisation that cares for its employees (Nel, 2001a:166). QWL is gaining in importance for employees, with emphasis placed on aspects like more free time, vacation and holidays (Desatnick, 1983:25).

Cascio (1995:23) views QWL against the background of the employee's perception of spiritual and physical well-being at work. By providing in the needs of the employees, mutual co-operation and trust is created which could play an important role in the process of collective bargaining and eventually could lead to a better relationship between employee and employer. Mistrust and the danger of industrial action is

lessened with both the employer and employee having a better chance at reaching their distinct objectives (Nel, 2001a:166).

QWL must never be underestimated, according to Grobler, et al., (2002:23) who states that an improvement in the QWL of employees has improved the performance of organisations throughout the world. In the United States of America (USA) research has shown that between one third and half of the educators who took part in a research, feel alienated towards their jobs, their colleagues and learners, they feel burnt out and want to quit and their wish is that they had never embarked on a teaching career (Dworkin, 1997:459). In South Africa educators feel desperate, therefore school principals must improve and maintain the QWL of their whole staff body in order to ensure quality learning and education in their schools.

## 3.6.2  Definition

Dessler (1981:546) describes QWL as the measure to which employees of an organisation is able to satisfy important personal needs by their experiences in the organisation. According to Halloran (1983:491 & 483) QWL indicates programmes developed by the unions or management or both in order to make the work situation more satisfactory and productive for employees. It could take place by means of an improvement in work cycles, quality control, compensation, self-satisfaction and self-actualisation. Werther and Davis (1989:466) add good working conditions and supervision as well as an interesting, challenging and rewarding job as important aspects of QWL. Erasmus and Van der Westhuizen (1996:226) summarize QWL by referring to it as a personal matter that is experienced in different ways by different people.

## 3.6.3  Approach

Cascio (1995:23) has a dual approach in regard to QWL. It must be approached from:
- objective organisational circumstances and practices that include, amongst others, democratic supervision, employee participation in decision-making, safe working conditions and promotion from within the organisation;
- perceptions of employees that they are relatively satisfied and that they are safe in their working conditions, with an opportunity for personal growth and development.

Mullins (1999:646-647) also states that QWL is determined by:

- Moral or ethical motivation based on the recognition of wider educational standards, changing social values, greater expectation of equality of work life, satisfaction in work situation and the functioning of management.

- Motivation that takes place by means of good business practice and enlightened self-interest, the need for cost competitiveness, efforts at limiting absenteeism, staff turnover, and removing dissatisfaction and other stumbling blocks that could influence the performance of the organisation.

Mullins (1999:647) further adds that goal achievement and the philosophy regarding the way in which people are managed, is determined by QWL. The important aspects here applicable are the following:

- **Quality of work life process**

The active involvement and participation of employees throughout the whole organization is of great importance.

- **Quality of work life goal**

Heightened organisational performance is influenced by the design of challenging, satisfactory and effective jobs and working conditions.

- **Quality of work life philosophy**

This is the view of people as assets that should be given opportunities and should be developed because they can give input in regard to skills, knowledge, experience and commitment. Employees should not just be seen as extensions of production, to be controlled (Mullins, 1999:647).

Employee involvement is an important factor in developing QWL (Dulebohn, et al., 1996:28). Higher levels of employee involvement can be linked to lower grievance levels within an organisation (Feuille & Hildebrand, 1996:346). Lawler (1980:379) proposes that QWL could be enforced by law by means of fees and taxes, although it might sound far-fetched. Action regarding QWL is important because it plays an important role in the safety and health of employees.

No organisation should therefore lose sight of the fact that QWL is set in place by the realisation of the social needs of employees by means of unselfish action (Nel, 2001a:166).

## 3.6.4 Ways to improve quality of work life in schools

QWL improves as soon as an employee's job addresses more and more personal needs (Carrell, et al., 2000:166). This entails the management and organisation of work, taking into consideration human dignity. (Erasmus & Van der Westhuizen, 1996:232).

The ways in which QWL could be improved in schools, can be summarized as follows:

### 3.6.4.1 Managerial action
- Maintenance of ethical employment practices
- Dedication to the Reconstruction and Development Programme (RDP)
- Sufficient and reasonable compensation and benefit programmes
- Organisation should be aimed at the community
- Job security
- Access to collective bargaining
- Participation in decision-making and organisational action
- Democratic and organisational justice in the workplace
- Transparency and trust
- Access to reserved information
- Managers should be leaders and coaches and not bosses or dictators
- Moving away from problem solving by management to a partnership between employees and management
- QWL not only to be initiated by employees
- Design of programmes, e.g. job design and job enrichment
- Alternative work arrangements, for example flexi-time
- Fair division of workload (Nel, 2001a:166; Carrell, et al., 2000:27; Beach, 1985:325; Walker, 1980:184-185; Cascio, 1995:24; Erasmus & Van der Westhuizen, 1996:233 & 238 and Dulebohn, et al., 1996:28).

### 3.6.4.2 Working conditions

- Safe and healthy working conditions
- Lay-out of workplaces and office design to promote creativity (Beach, 1985:325; Walker, 1980:184; Carrell et al., 2000:27 and Erasmus & Van der Westhuizen, 1996:237).

### 3.6.4.3 Training and development

- Provide training facilities
- Teambuilding activities
- Opportunities to develop abilities
- Provide spare time for consultation, in-service training and professional development
- Future opportunities for growth (Nel, 2001a:166; Carrell, et al., 2000:27; Beach, 1985:325; Erasmus & Van der Westhuizen, 1996:238 and Walker, 1980:184).

### 3.6.4.4 Personal influence

- Career advancement
- Making the job more rewarding
- Self-managed working teams
- Fair evaluation techniques
- Eliminating employee anxiety and fear
- Wellness programmes, for example, stress management, alcoholism, drug abuse help
- Social integration of the employee in the organisation
- Balance between work and personal aspects like relaxation, family life and education
- Right to freedom of speech and privacy
- Treatment with respect (Nel, 2001a:166; Carrell, et al., 2000:27-28; Beach, 1985:325; Erasmus & Van der Westhuizen, 1996:234 & 238; Walker, 1980:84-185 and Cascio, 1995:24).

### 3.6.4.5 Other

- Provision of recreational facilities

- Strong unions (Nel, 2001a:166 and Erasmus & Van der Westhuizen, 1996:238).

### 3.6.5  Influence of quality of work life on performance

In many organisations there is still a lack of clarity as to the provision of opportunities for personal growth and development by satisfying the employee's needs or removing harmful working conditions in order to promote QWL and the role that this would play in terms of improved productivity (Lawler, 1980:379). Dessler (1981:546), however, feels that employee performance and QWL go hand in hand, because factors that could contribute to performance, like compensation, financial incentives and effective employee selection could also make a contribution to QWL.

QWL tries to promote the interests of the employee and the organisation by the formulation of the policy and procedures which can improve the performance of the organisation, and also tries to ensure the well-being of the employee (Dulebohn, et al., 1996:28) If good relationships are created from the interaction between employees and management, it leads to QWL and eventually to improved productivity (Klatt, et al., 1985:4). By means of effective job design the organisation can aim at improving employee satisfaction and thereby also improving performance. If QWL is continuously improved the result would be improved motivation and eventually improved results by employees (Armstrong, 1996:180 & 388).

## 3.7  LEADERSHIP

### 3.7.1  Introduction

When people get together for the realisation of a specific goal, leadership immediately comes to the front (De Wet, 1980:126). The reasons for the success or failure of an organisation can often be traced to the leadership position (Kruger, 1990:319). Leadership is very important in education because the school principal has an enormous influence on the school – a central figure around which authority, management and inspiration rotate (Van der Westhuizen, 1990:195 and Bernard, 1981:55). The school principal as leader must be focused on good people management by setting clear objectives, providing help in achieving these objectives, evaluating performance and giving regular feedback (Buchel, 1995:46).

A question that is often asked is why schools differ so much from each other, with the answer to be given more than once: leadership (Hanson, 1996:154). Leadership is seen as very important in achieving effective schools and this leadership must be supplied by the school principal. Effective leadership by the school principal must be firm and purposeful in order to manage internal and external changes that influence staff in the school. By means of a participative approach the school principal must involve other staff in decision-making and management. The school principal must, furthermore, be an instructional leader, because instruction is the purpose of any school (Reynolds & Teddlie, 2000:141-143). The important role of the school principal as leader was emphasized a long time ago already by the Australian Department of Education which published a journal for school inspectors and school principals known as "The Leader" (Walker, 1972:30). The school principal as purposeful education leader must be actively involved in all activities at the school, without having total control (Stoll, 1992:107).

Being a true leader is something that must be earned by the school principal because modern culture does not give automatic followership to school principals (Van der Westhuizen, 1990:200). The success of the school principal as leader is determined by the achievement of his status as leader (De Wet, 1980:127). In his role as leader of the school, the school principal must have a mindset of caring for people and a willingness to invest time, money, energy, resources to benefit others (Frase & Hetzel, 1990:1).

Mazzarella (1983a:35) further postulates that leaders of education should be outgoing, good at working with people and should posses good communication abilities and skills. They should have initiative, be cognisant of their goals and feel secure. Education leaders should be proactive and not scared of stretching the rules, but should also realise which compromises are to be undertaken in order to make things happen. For the purposes of this study focus will be placed on the school principal as leader of the staff of the school, which includes educators and non-educators.

### 3.7.2 Definition

Leadership is seen by Lathlean (1974:271) as a personal relationship where one person gives direction, coordinates and supervises others in the execution of a common task. Leadership entails an individual influencing other individuals in such a

way that they voluntarily and enthusiastically want to achieve the goals of a group or an organisation (Werner, 2001b:349 and Du Toit & Marx, 1981:255). This two-directional relationship speaks of mutual influence from the leader to the followers and the influence that the followers have on the leader (Werner, 2001b:349). Covey (1994:101) states that leadership is the ability to do the right things.

A leader designs the relationships between members of a group and the leader, and establishes well-defined organisational structures, communication channels and ways in which to get the job done while simultaneously the leadership reflects friendship, mutual trust, respect and warmth (Walker, 1972:32). By means of leadership a working relationship should be established between members of a group. Leadership is identified by the ability to bring about active participation and by demonstrating the ability to complete assignments and duties (Walton, 1969:119).

In education, leadership entails the management of all activities of everyone involved with education and teaching in the school situation, to achieve predetermined goals and aims (Bernard, 1981:58). The school principal as professional leader should be concentrating on the needs, possibilities and duties of educational leadership (Van der Westhuizen, 1990:201).

Maxcy (1991:4) states that leadership of schools as organisations should come from the top (led from above) to be successful. The school principal as leader of the school and his staff therefore has an enormous task. For the school principal educational leadership comes down to the view of Carnegie (1994:207) who encourages people towards leadership and expects that a leader will change people without offending or hurting them.

### 3.7.3  Leadership in the educational environment

Leadership in a school situation is directly influenced by group functioning (Wiles & Bondi, 1983:289). Although school leadership is unique and differs from leadership in the business sector, there are also many similarities. School principals have a particularly complex leadership role where they are continuously trying to create a positive learning environment in their schools, restore authority and discipline, bring about cooperation with parent associations in order to create stability in schools and

make schools a place of safety for learners and educators. By these means school principals want to bring about the overall objective of the school in regard to the creation of a professional culture of learning to establish effective education and involving parents in the education of their children (Coleman, 2003b:181). Mazzarella (1983b:58) describes school leadership of school principals as the manner in which leadership is expressed by school principals in the exercising of power and authority, decision-making and general interaction with educators and other people. The view of leadership in the educational environment is summarized as follows by Wiles and Bondi (1983:290) and Van der Westhuizen (1990:196):

- Leadership in group situations is essential for the school principal.
- Continuous interaction between the leader and followers, specifically by means of communication.
- The school principal gets specific status by filling the role, but the status does not necessarily ensure leadership.
- Accept that all followers will not readily accept the exercise of leadership.
- Group norms have a determining influence on the leader.
- Effective leadership ensures good followers.
- Leaders set to exercise control are not accepted in leadership roles.
- People's view of a person determines whether or not someone will be tolerated in a leadership role.
- Leadership differs in different situations.
- Stimulation of followers towards the achievement of goals and responsible action.

The school principal as education leader must develop leadership amongst educators specifically, but also other staff categories. It can take place by expanding and diversifying the job of the educator and thereby drawing educators closer for the education and also retaining present educators. School principals will never be able to develop his/her staff while the focus is placed on himself/herself as leader. Own superior knowledge, competence or status should not be used to impress subordinates or to force authority on to them (Mol, 2003:34-35). Furthermore, new incentives, controls and opportunities for professional development can be established to endeavour to improve the performance of educators. Educators must also be placed in positions where they can exercise influence and decision-making; via this

HR expertise can be applied for the school's benefit (Smylie, 1997:521-522). The school principal as leader of the school's whole staff therefore has a great responsibility in developing leaders in the school by his/her leadership position.

### 3.7.4 School leadership in an African context

In developing countries, and more specifically, African countries, school leadership is viewed as authoritarian, due to the following reasons:

- schoolroom practice is authoritarian, and as school principals are recruited from this cadre, they maintain the same style of leadership;
- the educational system is highly decentralised and a top-down approach is followed;
- a traditional view is held that leadership should always be provided by men, where power and domination is the order of the day.

Against this background leadership is allocated to the school principal. Many educators in South Africa are, however, still of the opinion that the school principal should take all responsibility and they are therefore unwilling to accept authority (Coleman, 2003a: 155 & 160).

In the present educational set-up, however, leadership is not the prerogative of the school principal and the SMT. The emphasis has shifted to individual responsibility of the whole staff (Van Deventer, 2003a:170). This view opposes the traditional South African and African view of leadership in schools. This principle can even be taken further by referring to the values of Ubuntu for school principals.

The principles of "Ubuntu" form the African basis for school principals. "Ubuntu" (Umuntu Ngumintu Ngabantu) means "a person is a person through other people". "Ubuntu" is embedded in the concept of communalism, which underwrites principles of support, cooperation and solidarity. The core values of "Ubuntu" are morality, interdependence, human dignity and human potential (Van Deventer, 2003a:71).

### 3.7.5 Role of women in education management

Women in South Africa dominate the field of education, but their positions in regard to leadership roles are severely limited (De Witt, 1990:548). Respondents in the Free

State Province who took part in the empirical research of this study, indicated that only 16,4% of school principals are women (cf. Table 4.9).

Studies in the USA have indicated that female school principals, over and above their other qualities, also give more time to colleagues and that their conduct is more informal, with politeness being at the forefront and that they are more tentative than men and would rather make use of collaborative strategies in solving conflict (Coleman, 2003a:166). There is, therefore, no reason why women who possess the required qualifications and abilities should not function to a greater degree on management level, specifically in schools (De Witt, 1990:549).

Women are seen as having a natural aptitude for management and their communication skills specifically can play a key role in education management. There is greater proof that women possess the leadership abilities that bring strengths in regard to leadership and management to the educational profession (Coleman, 2003a:166-167). Therefore Kaabwe (2003:215) suggests that strategies should be put in place to make appointment into management positions more accessible to women.

## 3.7.6 Leadership characteristics of a school principal

A good leader should continuously be in the process of introspection in order to identify and overcome shortcomings within himself/herself. These lacking abilities could then be learnt. The process is also beneficial in applying strong characteristics in such a way that shortcomings will be minimized (Kruger, 1990:403). The attributes or characteristics of a good leader and more specifically an effective school principal are summarised as follows:

- Revealing vision and the courage to make decisions that greatly influence a school or a community.
- Bridging the gap between where the school is and where the school principal wants it to be by means of proper planning.
- Ensuring that decision-making takes place by means of proven information and is not based on guesswork.
- Solving problems should be explained in an understandable way to followers.
- Taking a scientific approach in regard to the educational process.

- Focusing on top-level service provision brought about by good work.

- Being involved in a leadership capacity in the structuring of activities in the school situation.

- Ensuring the application of staff and other resources to achieve the goals of the school, the clear communication of the school's goals and the involvement and visibility in all activities.

- Ensuring the professional growth and application of educators by professional influence.

- Promoting staff development by delegating responsibility.

- Providing continuous help and support to educators by treating them professionally.

- Establishing realistic and achievable goals in cooperation with subordinates in view of satisfying their needs.

- Showing enthusiastic, energetic and real dedication to the educational responsibility.

- Having self-confidence with self-assuredness in action, also including being well-spoken.

- Having the ability to bring about cooperation and be adaptable and flexible.

- Creating horizontal and vertical two-way communication channels.

- Being honest at all times.

- Maintaining balanced judgment and action based on a sound mind.

- Determining action and decision-making.

- Keeping up to date as to the development and change in education.

- Being an organised leader who can delegate and inspire trust.

- Being original.

- Being capable of handling stress.

- Maintaining a high standard of organisation of school activities by making use of term or annual programmes.

- Acting as motivator of staff.

- Knowing that educational leadership is not bureaucratic leadership.

- Maintaining a balance between task orientation and people orientation.

- Maintaining leadership by human action based on knowledge of people.

- Promoting high professional ideals (Rowe, Mason & Dickel, 1982:228; Bradley, 1993:177; Sergiovanni & Carver, 1980:269; Leithwood, Begley & Cousins, 1992:13; Tanner & Tanner, 1987:109; Theron & Bothma, 1988:16; Bernard, 1981:79; Bridges, 1977:204; Kruger, 1990:403-404; Prinsloo, 2003a:148 and Beare, Caldwell & Millikan, 1997:26).

### 3.7.7 Situational leadership and the school principal

According to Bothma (1988:8-13) the school principal is in a situation where leadership action needs to be made applicable over unequal groups of subordinates. The school principal must be able to serve educators, administrative and service staff, learners, parents and society as a leader. For the purposes of this study the focus is placed on educators, administrative and support staff.

The situational theory that places emphasis on the following four management styles seems to be an ideal point of departure for school principals as leaders in a unique staff composition. The four management styles, according to Hersey and Blanchard (1982:153-154), are as follows:

- Telling style is characterised by decision-making by the leader, one-way communication and specific instructions.
- Selling style where consultation and two-way communication are present, but guidance is mostly still supplied by the leader.
- Participating style which is noted for shared decision-making and multi-directional communication facilitated by the leader.
- Delegating style in which followers play an active role in carrying out plans, although the leader may still identify the problem.

The school principal should be aware of the fact that there is no ideal leadership style for a school principal, but that the understanding of a situation plays a definitive role in the choice of action.

The school principal is in the difficult position that he/she is the leader of leaders within the school situation and still has to function effectively as motivator, initiator, activator, inspiration and encourager (De Wet, 1980:126-127).

## 3.8  GROUPS IN ORGANISATIONS

### 3.8.1  Introduction

Group formation is an insoluble part of modern society (Uys, 1995:283). It also plays an important role in all organisations that are made up of individual employees, who are placed into groups as a result of work activities and functions (Van Dyk, 1995c:382). Group functioning is an ideal way of achieving organisational objectives, because it encourages involvement in regard to decision-making and gives a feeling of ownership to group members (Middlewood, 2003c:172). A large part of the daily task of an effective school principal is also planned and completed in groups and much time is spent on different groups in different circumstances, with different goals (Bondesio & De Witt, 1990:312).

The groups with which the school principal has to work and of which he/she needs to, include the following:

- the staff as a whole;
- committees made up of staff members;
- parent committees;
- SGB;
- Representative Council of Learners (RCL) (Bernard, 1981:37).

It is therefore essential that the manager, including the school principal, will reveal a thorough knowledge and understanding of groups and group processes in order to be able to use the benefits of group formation to prevent the functioning of groups having a negative influence on the management of the organisation (school) (Uys, 1995:283). The success of any group depends largely on the group members who are the lifeblood of the group. The school principal as HR manager of the school must ensure that people who are allocated to a group in order to fulfil a specific task are the correct people, thus ensuring success (Hastings, 1987:226). School principals must realise that all groups in the school affect the school's educators and other staff and that this management task needs to be handled very professionally.

### 3.8.2 Defining a group

Uys (1995:283) describes a group as two or more people voluntarily relating to each other and influencing each other. Atchinson (1974:164) adds that the members of a group should be viewed collectively with certain identification with the group and patterned interactions that would distinguish them as group members. A group (team) is described by O'Neill (1997:77-78) as a small group of people who are positive regarding possible differences (or conflict) when they work together in order to bring about viable solutions.

### 3.8.3 Reasons for management through groups

The use of groups in the management of a school can be set out as follows:

- It leads to improved communication amongst people.
- The chances of finding creative solutions to problems are improved because a wider variety of talents and abilities are brought to the floor.
- Members of a group can represent a wide range of interests in the school, which an individual is not able to do.
- Decisions are much more likely to be accepted and implemented than those decisions taken by individuals.
- It can lead to valuable opportunities for personal and professional development (Middlewood, 2003c:172).

### 3.8.4 Criteria for group classification

The criteria for group classification can be summarized as follows:

- There should be interaction amongst group members that would imply continuous communication in order to achieve a common goal.
- Group members should be inter-dependent on one another. This comes down to mutual influencing and is closely correlated to the first criteria, which demands interaction amongst group members.
- A stable relationship should exist amongst group members, which indicates stable structural contact amongst group members.
- Group members should strive for a common goal or aims.
- Group identity is an essential characteristic of a group, which indicates group members who agree that they form a group.

- Group members have certain expectations of one another as to behaviour.
- Group members should be aware of one another.
- The size of a group is important. A collection of people not showing direct influence or interaction with one another is not a group (Smit & Cronjé, 1992:299-300; Prinsloo, 2003b:190; Van Dyk, 1995c:383 and Werner, 2001c:373).

### 3.8.5  Types of groups

In Van Dyk (1995c:386) the different types of groups are described according to the Fiedler's leadership effectiveness theory:

- Interactive groups where the work or output of one group forms the input for another group, for example in a school.
- Co-acting groups where the work of the different groups is described independently of one another, for example, in a school.
- Counter-acting groups function in interaction with one another to collect information or solve problems, for example in a school.

#### 3.8.5.1  Formal and informal characteristics of a group

According to Bondesio and De Witt (1990:314) and Bernard (1981:37) the informal characteristics of a group are as follows:

- A group is set up to achieve a specific objective.
- A chairperson or leader for the group is selected.
- Rules and assignments are set in place for the group to regulate action.
- Mutual group projects where unwritten rules or prescribed systems are approached and completed.

The informal characteristics of a group, according to Bondesio and De Witt (1990:314-315) and Bernard (1981:37), are:

- Original goals or objectives that were laid down with the formation of the group, are often replaced with others that are seen as important by the group.
- Leadership is taken over by more than one individual from time to time.
- Certain expectations and norms are revealed that form behaviour partners for the group.

- Informal communication systems exist within the group that are not always acceptable to outsiders or not clear or acceptable to new members.

### 3.8.5.2  Formal and informal groups

The existence of formal groups is usually constituted and the goal and lifespan thereof is determined beforehand (Uys, 1995:283). Characteristic is the formal organisational group where goals and activities are connected to the achievement of stated goals (Werner, 2001c:374). The existence of a formal group is usually supported by the organisation and maintained until the tasks or goals are well formulated (Van Dyk, 1995c:388). In other words, formal groups form part of the organisational structure and are formed during the organisational process (Werner, 2001c:374). These groups are usually made up of a manager and a number of subordinates, which can vary (Van Dyk, 1995c:388). Examples in schools are departments, sections, task groups and committees (Werner, 2001c:374).

Informal groups develop within a formal organisational structure where regular interaction is to be found (Uys, 1990:307). The goal of informal groups is that of social interaction, negating personal needs in order to achieve the goals of the group (Werner, 2001c:374 and Uys, 1990:307). These groups develop out of daily interaction and views that develop spontaneously to satisfy set needs. Informal groups can serve as a source of identification, communication, motivation, status, power and security for members (Werner, 2001c:375).

### 3.8.5.3  Description of groups

The following groups can be distinguished:

- **Authority or command groups**

Characteristic of this group is the presence of a formal organogram and line of authority with subordinates who rapport directly to a specific supervisor (Werner, 2001c:375 and Uys, 1995:283).

- **Task group**

This group is created in order to complete a specific task or project. The group is normally dissolved with the completion of the project or task (Werner, 2001c:375).

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- **Interest groups**

An interest group can be formal or informal and is sometimes formed as a united front focused on a specific task (Werner, 2001c:375 and Uys, 1995:284). This group could have a line of authority and the group could have a task to complete, but the reason for the existence of the group would still be the common interest of the members. An interest group can be explained by use of the following example. Five educators with an interest in learners with learning problems form a formal interest group if they are requested to investigate means of helping these learners and report thereon. If the group of educators do their own individual research about the subject and discuss their findings during tea time, they form an informal interest group (Werner, 2001c:375).

- **Friendship groups**

Friendship groups are formed if individuals share a common characteristic. Such a group could be based on persons of the same age group, ethnical heritage and sport support (Werner, 2001c:375).

## 3.8.6  Group size

### 3.8.6.1  Small groups

Smaller groups are more effective in completing specific tasks. These groups work faster with the handing of responsibility to individuals (Werner, 2001c:383). Smaller groups are important to the school principal, because group behaviour and action connected to goals are important in the actualisation of educational objectives with the action of the group. A strong sense of loyalty is present in smaller groups with a limitation as to the physical and spiritual distance amongst members. The leader still determines the style and approach of the group, but a group spirit is developed at a greater rate than is the case with larger groups (Bondesio & De Witt, 1990:313-314). Smaller groups also interact more constructively and they find it easier to reach consensus regarding a specific matter. They are furthermore aimed at confirming the common purpose, goals and approach, therefore ensuring mutual accountability (South African Management Development Institute, 2002c:184). Groups that have five to seven members seem to be the ideal, because the group is small enough to

eradicate domination, the formation of cliques and inhibited participation, although there is sufficient space for proper participation (Werner, 2001c:383).

### 3.8.6.2  Large groups

Large groups made up of fifteen or more members, are usually instituted in order to do work on a comprehensive task that requires much experienced and widely diffused ideas. A negative aspect of large groups is that group members could disappear and passively assume that someone would stand in for them (Werner, 2001c:383). If the group is relatively large, more skills, talents and knowledge is present, but there are less opportunities for participation (Handy, 1980:177).

## 3.8.7  Group effectiveness

A group is effective if a high level of task completion is maintained with HR maintenance over a period of time (Uys, 1995:286). Effective groups are essential to any organisation's success and could be compared to cells in a honeycomb. Although groups have fewer ideas than the sum total of individuals functioning on their own, their ideas are better developed. Groups also take more risky decisions than individuals as a result of shared responsibility (Handy, 1980:175).

### 3.8.7.1  Characteristics of effective groups

According to Van Dyk (1995c:389), Uys (1995:286) and Werner (2001c:379) effective groups have the following characteristics:

- The group knows what the reason is for its existence.
- Decision-making takes place according to guidelines and procedures.
- Group members communicate fully and openly.
- Conflict is handled constructively.
- Processes are determined and members themselves improve own functioning.
- Loyalty and trust amongst members.
- Group values and objectives reflect the personal values and needs of members.
- Development of the members' own personal potential.
- Self-confidence of members to make decisions amongst themselves.

### 3.8.7.2  Factors influencing effective functioning of groups

According to Bondesio and De Witt (1990:314), the school principal should take note of the following factors that could influence effective group functioning:

- Size of the group
- Communication patterns
- Group norms
- Group cohesion
- Internal competition amongst group members
- Co-operation
- Status differentiation within the group

### 3.8.7.3  Group unity and cohesion

- **Group unity**

The unity of the group shows the influence of the group on its members, because the greater the team unity, the more positive the members of the group and the greater the potential influence of the group (Van Dyk, 1995:393). The eventual outcome is diminished tension, uncertainty, conflict and misunderstandings resulting in improved productivity of group members (Van Dyk, 1995:393 and Uys, 1990:310).

In Van Dyk (1995:394-395) the following factors are distinguished which have an influence on group unity:

- Size of the group
- Intra- and inter-group competition
- Group status
- Group objectives
- Working milieu
- Steadfast relationships

Higher group unity leads to the effective functioning of the group.

- **Group cohesion**

Group cohesion refers to the measure to which a group attract members by means of objectives and common interest (Van Dyk, 1995c:390) and the measure to which the group motivates members to stay on as members of the group (Uys, 1995:290).

A group can be attractive to individuals as a result of the following factors:
- Members are of the same age group with similar needs and backgrounds.
- Respect for individual abilities and skills.
- Agreement regarding corporate action.
- Tasks require corporate action.
- Group is relatively small and members can voice their own opinions.
- Group is physically isolated.
- Group members are achieving exceptional success.
- Crises and failure can also be present.
- Goals of the group are acceptable to members.
- Presence of a charismatic leader.
- Reputation for successful achievement of goals.
- Mutual support (Smit & Cronjé, 1992:310 and Uys, 1995:290).

### 3.8.7.4 Group functioning with regard to group decision-making

Decision-making in schools takes place by means of group decision-making, whether the staff as a whole makes a decision or the decision is made by a committee. Group decision-making comes to prominence with the popularity connected to participative management where decision-making is the result of interpersonal decision-making processes and group dynamics.

Decision-making in regard to groups shows the following benefits:
- A large sum of knowledge is available to make informed decisions.
- Creative solutions are the result of mutual support by group members.
- Decision-making in groups leads to greater acceptance of the decision.
- Groups are prepared to take greater risks than individuals, resulting in shared responsibility.
- Group members evaluate each other's thought patterns, which minimises mistakes.
- Groups are more effective than individuals in finding solutions (Van Deventer, 2003b:103).

Decision-making in regard to groups shows the following disadvantages:
- Groups create pressure toward conformity in thinking.

- Individual acceptance of responsibility does not exist.
- Decision-making in groups shows the trend to accept the first acceptable solution.
- It is very time-consuming.
- Dominant group members mostly make decisions within the group.
- Inputs that could have been valuable are lost because certain individuals do not show the patience to be able to function within the group setup (Van Deventer, 2003b:103-104).

### 3.8.7.5 Functioning of school principal in a group

A school principal has an important task in acting as leader, but also in offering staff the opportunity to act as leaders and to inspire them as such (Bernard, 1981:40).

The contributions of the school principal within the group can be summarized as follows:

- Leads the group to determine goals and demarcate problems.
- Creates a co-operative, comfortable atmosphere.
- Facilitates problem solving by the application of the skills and knowledge of the group.
- Maintains respect, appreciation and understanding for every member.
- Creates space for the group to find their own answers.
- Determines procedures to be followed.
- Gives group sufficient time to discuss problems.
- Acts as a silent co-worker.
- Sees to group participation and responsibility.
- Develops skills, capabilities, interests and abilities of members, including leadership.
- Provides logistical support.
- Provides space for self-evaluation of group.
- Is sensitive towards group techniques and human relationships (Bernard, 1981:39-40).

## 3.9 LABOUR RELATIONS

### 3.9.1 Labour relations as a human relations function

The success and competitiveness of any organisation is greatly influenced by good labour relations (Carrell, et al., 2000:454). If labour in an organisation is not well organised, individuals have very little power in their relationship with their employer. The employer determines treatment and benefits and management often ignore the important ingredient of the organisation, which is the employee (Chruden & Sherman, 1984:329). Both the employer and the employee have a need for organisational justice in the workplace, which comes down to fair treatment (Feuille & Hildebrand, 1996:340). If employees feel that the treatment given by the organisation is unfair, they can resign or turn to negotiation with the organisation regarding their circumstances. In this way employees obtain a monopolistic control over their services (Chruden & Sherman, 1984:329).

Labour relations comes down to the study of relationships, interaction and conflict between management and labour, the existence of labour organisations, unions, collective bargaining, grievances, arbitration, disputes and legislation (Du Toit, 1995:416). Griffen (1990:373) and Stone (1982:462) see labour relations as a process where employees who are represented by a union, negotiate with employers while Bartol and Martin (1991:429) place the emphasis on the negotiation in terms of compensation, working hours and other terms of service which include the drawing up of a contract for a specific time period.

The objective of labour relations as seen against the background of legislation and collective bargaining is to realise the objectives of employer and employee with the emphasis on mutual respect for the other party's goals and needs and recognition of each other's human and legislative rights (Du Toit, 1995:416).

### 3.9.2 Unions

The presence of unions has a great influence on the structure of an organisation and the management of HR, and changes the working conditions in which the employees and organisation function (Werther & Davis, 1989:502; Carrell, et al., 2000:454 and Cronjé & Van Wyk, 1981:121). HR policy and procedures are influenced by similarities

between management and unions and lead to proper handling of grievances, arbitration and handling of discipline, terms of contract and clear job duties and rights (Beach, 1985:17). Unions have an important influence on the social and economical well-being of its members and play a primary role in the economy of a country (Andrews, 1985:356). School principals find themselves in a difficult position in regard to their relationship to unions, because their responsibility towards the learners of the school in terms of quality education clashes with strikes, go-slows and chalk-downs, which disrupt schools and interrupt teaching. School principals therefore have the problematic task of managing the professional feeling of educators in such a way that union action does not influence the learning process in schools negatively (Van Deventer, 2003d:261).

### 3.9.2.1 Unions defined

Andrews (1985:356) defines unions very simply as a group of individuals who come together to organise their relationship with the employer, with Carrell, et al. (2000:454) and Klatt, et al. (1985:16) describing an union as an organisation of workers who are set at promoting the economical and social interest of its members.

### 3.9.2.2 Reasons for employees to be unionised

By unionising, employees' power is enlarged and they obtain the opportunity to vent their feelings (Baron & Kreps, 1999:129). All employees have certain needs, and want to achieve specified goals. They feel that, by joining a union, outcomes can be achieved that would not be possible as an individual (Pigors & Myers, 1965:184 and Sherman & Bohlander, 1992:566).

The reasons why employees, including educational staff, join a union can be summarised as follows:

- Compensation and benefits (bread and butter matters)
- Economic security
- Job security
- Working conditions
- Fair treatment, maintaining personal integrity and respect
- Group participation in terms of decision-making
- Promotions and transfers

- Expressions of dissatisfaction
- Independent control of own affairs
- Dull and degrading jobs
- Promises not kept by management
- Lack of training for advancement (Pigors & Myers, 1965:184; Sherman & Bohlander, 1992:566; French, 1974:577; Yaney, 1972:55.9 and Carrell et al., 2000:454-455).

### 3.9.2.3  Types of unions

Carrell, et al. (2000:455) describe three types of unions and for the purposes of this study this will suffice.

- **Industrial unions**

These consist of semi-skilled blue-collar employees in specific industries like transport and construction. The biggest unions in South Africa resort under this category, namely the National Union of Mine-workers (NUM) and the National Union of Metal-workers (NUMSA).

- **Trade union**

Trade unions are also known as craft unions and consist of skilled employees that include specific trades like plumbers and electricians.

- **Employee association**

Professional and white-collar employees are given representation here and it includes, amongst others, educators, police, clerical, technical and defence forces. The Public Servants Association (PSA) is an example of an employee association.  Unions play a very important role, especially during the shortlisting and interviewing process in schools, but only unions registered with ELRC have the right to participate in the above-mentioned process. These unions are the National Professional Teachers Organisation of South Africa, South African Democratic Teachers Union and Suid Afrikaanse Onderwysersunie (Free State Department of Education, 2003b:ii).

## 3.9.3  Collective bargaining

Collective bargaining is a continuous dynamic predetermined relationship between the employer and a union (Crane, 1979:538). This is a process during which certain rules

for actions are determined and a balanced power basis is set in place between labour and management, so that differences can be handled to the benefit of both parties (Stone, 1982:462). By means of collective bargaining it is endeavoured to manage labour agreements and disputes in an orderly fashion (Armstrong, 1996:714), but it entails more than just negotiation and can also include economic pressure by unions by means of strikes and boycotts (Sherman & Bohlander, 1992:598).

## 3.9.4  Grievance process

### 3.9.4.1  Introduction

Carrell, et al. (2000:476) see grievance procedure as a judicial mechanism according to which contraventions of the labour agreement is handled with the grievance procedure as an important ingredient of the labour agreement. It is an orderly process by means of which the employment contract is managed on a day-by-day basis (Dessler, 1981:464).

The grievance procedure entails the handling of an employee's request or complaint regarding working conditions according to certain predetermined steps (Torrington & Chapman, 1979:165).  It is very important that any situation which is job-related and which is seen as unfair or unreasonable by an employee, be handled according to the grievance procedure, even if the feeling exists that the employee is in the wrong, or that the complaint is irrelevant (Crane, 1979:79). All complaints of employees must be handled as potential grievances, because it may prevent a grievance from occurring (Halloran, 1983:475).

Staff members (Departmental or SGB appointments) have the right to request that work situations experienced by them as unfair or unjust be handled according to stipulated grievance procedures. Staff grievances entail personal disputes that must be managed (Roberson, Personal interview: 2 October 2003).  Grievances need to be addressed speedily in order to prevent a grievance from developing into a dispute (PAM, 1998: Chapter H) (ELRC, 1998a).  A grievance is described in the Employment of Educators Act, 76 of 1998 9(2)(2.1) (ELRC, 1998b) as, "a complaint by an employee or employees affecting the employment relationship of the person or persons concerned or where there is an alleged misinterpretation, or violation of his or

her, or their rights." In Government Gazette No. 25209 (2003:3) (Republic of South Africa, 2003) a grievance is described, according to the Public Service Commission Act, 46 of 1997 for members of the civil service as, "means a dissatisfaction regarding an offhand act or omission by the employer which adversely affects an employee in the employment relationship, excluding an alleged unfair dismissal".

### 3.9.4.2  Purpose of grievance procedure

- **Grievances in the public service**

The purpose of the grievance procedure is to advance sound labour relations and to manage grievances in the public service to ensure that grievances:
  - are handled speedily, without bias and fair;
  - will promote healthy labour relations;
  - that are individual in nature will be solved at the lowest possible level (Government Gazette No. 25209, 2003:4) (Republic of South Africa, 2003).

- **Grievances in the education sector**

The Employment of Educators Act 76 of 1998 describes the purpose of these grievance procedures in the education sector as being the resolution of complaints on a personal level as soon and as close to the source of the complaints as possible (Employment Education Act, 76 of 1998) (ELRC, 1998b).

### 3.9.4.3  Managing a grievance in the Public sector

The Public Service Commission Act 46 of 1997 in the Government Gazette No. 25209 (2003:4) (Republic of South Africa, 2003) constitutes that grievance must be managed as follows:

- The employer (the school) must resolve the grievance and do this as close as possible to the source.

- The employer (the school) must ensure that grievances are handled with fairness and without bias and prejudice by complying with the principles of natural justice.

- Both employers (the school) and employees must be given the opportunity to express dissatisfaction (Audi Alternam Partem).

- Grievances should not lead to victimization or injury to staff.

- Disciplinary action against an employer is not driven by any action taken by the employer to address any aspect regarding the disciplinary action.

- The grievance and the process regarding the grievance must take place in writing.

- An employer may be assisted by a representative.

### 3.9.4.4 Dealing with grievances according to the Employment of Educators Act, 76 of 1998

Grievances are handled as follows:

- **Oral interview**
  - ➤ A real effort must be put towards trying to solve grievances by means of an oral interview before it goes over into a formalized grievance.

  - ➤ The process is not to be recorded.

  - ➤ Any sanction must, however, be registered in writing.

- **Formal written grievance**
  - ➤ Grievances must be handed within a reasonable period of time, but no longer than 90 days after the matter is handed over to the institution (the school principal).

> ➤ Grievance must be done in writing and must be signed by the grievant.

> ➤ Upon receipt of the grievance the school principal must deliberate with the grievant(s) within three days, taking into consideration all facts of the grievance, and must bring it to solution with all parties in agreement.

> ➤ The school principal must communicate the resolution or non-resolution to the Provincial Education Department within five days.

> ➤ Where the matter affects the school principal it can be directed straight to the provincial department (Employment of Educators Act, 76 of 1998).

- Forms A, B or C are completed according to departmental regulations (Government Gazette No. 25209, 2003:13-19) (Republic of South Africa, 2003)

## 3.9.5  Discipline

### 3.9.5.1  Definition and objective

Discipline entails action taken from a position of authority within an organisation that is aimed at preventing employees from damaging the organisation by their action (Nel, 2001a:155). It therefore comes down to the influencing of people's behaviour in order to create an atmosphere wherein contravention does not take place (Marx, 1993:291).

Du Toit and Marx (1981:254) define discipline as the formation and consolidation of a person's behaviour to ensure specific behaviour or action, thus promoting the achievement of goals. Werther and Davis (1989:487) see discipline as a management action used to encourage the achievement of the standards of the organisation and Fulmer (1977:487) adds that it comes down to a mutual responsibility of both the employer and the employee.

Discipline entails the formation or correction of behaviour by means of the achievement and mutual maintenance of orderly employee action because most employees want to act in such a way that it is acceptable for the organisation and co-employees (Beach, 1985:48). Discipline therefore does not mean punishment but

punishment is the ultimate outcome for employees who do contravene this (Marx, 1993:378 and Beach, 1985:48). Real discipline, however, entails preventative action (Fulmer, 1977:487).

The objective of discipline, according to Kroon (1995:191), is to remove unacceptable behaviour, which has unpleasant results, but action taken must have educational value. Discipline aims at preventing conflict in the workplace, promoting the interests of the employer and employee and ensuring good labour relations (Free State Department of Education, 2001b:10). The purpose of discipline is regulating human activities thus that it will lead to a controlled performance (Torrington, 1987:548).

### 3.9.5.2  Principles of discipline

The principles of the application of fair disciplinary procedures are summarised as follows:

- Discipline is aimed at the prevention of unacceptable behaviour.
- Procedures must be in writing.
- Punishment must agree with the contravention.
- Discipline must be progressive.
- Dismissal should be the last resort and top management makes the decision.
- Flexibility and consistency are important.
- Disciplinary actions should take place as soon as possible after the contravention has taken place.
- Warnings must lapse after a period of time.
- Discipline must be substantively and procedurally fair (Free State Department of Education, 2001b:14).

### 3.9.5.3  Approaches

The application of discipline can also be approached in different ways. A short overview of different approaches will now be given.

### (a)  Negative discipline

Negative discipline is also described as positive discipline or discipline through fear. Negative discipline entails that employees are automatically punished for deviating

from the standard behaviour and this serves as a deterrent for other employees not to commit similar contraventions. It could also serve as a warning for those employees seeking to avoid punishment by doing the minimum. However, this approach to discipline usually has negative results and lowers the morale of employees (Crane 1979:201 &378; Carrell, et al. 2000:503; Beach, 1985:372; Du Toit & Marx, 1981:254 and Marx, 1993:378).

**(b)  Preventative discipline**

This approach focuses on the management of employees in such a way that their behaviour does not warrant disciplinary action (Marx, 1993:378 and Carrell, et al., 2000:504). Employees are also encouraged to adhere to rules, regulations and codes of conduct with the objective of promoting self-discipline amongst employees without enforced discipline by management (Werther & Davis, 1989:487 and Marx, 1993:378).

**(c)  Positive discipline**

Positive discipline is described by Marx (1993:378), Crane (1979:201), Werther and Davis (1989:488) and DuBrin and Ireland (1993:355-360) as corrective discipline. French (1974:168) sees corrective discipline as the progressive approach of discipline. For the purposes of this study focus will be placed on positive discipline, also known as corrective discipline, with the progressive approach being described separately.

The point of departure, according to Marx (1993:378), is correcting the unsatisfactory action of employees by means of support, respect and leadership aimed at people and thereby improving the future instead of punishing the past by emphasizing training. This kind of discipline, which is aimed at people and applied without bias, results in the strengthening of the morale of employees and the promotion of job security and welfare of employees (Crane, 1979:201). This approach is seen as constructive repair without punishment by Mathis and Jackson (2000:592) and focuses on problem solving. Werther and Davis (1989:488) see the goal of corrective discipline as positive and educational rather than correctional. By means of this approach the development of problems could be prevented that could necessitate disciplinary action (Chruden & Sherman, 1984:381). The employee is therefore

afforded the opportunity to change behaviour or correct weak performance before it could result in action directed at punishment (DuBrin & Ireland, 1993:360).

**(d)  Progressive discipline**

This approach aims at shaping the behaviour of the employee by following certain steps, but the action taken becomes progressively more serious as the employee keeps offending (Mathis & Jackson, 2000:592). The goal is to correct the employee's action (French, 1974:169).

The process of progressive discipline is as follows:

- Oral warning or counselling
- Written warning
- Final warning (could also lead to a disciplinary layoff, demotion, suspension)
- Discharge (French:1974:169; Mathis & Jackson, 2000:592).

**3.9.5.4  Disciplinary procedures**

The management of the organisation should communicate the policy and procedures of disciplinary action clearly to everyone affected thereby (Crane, 1979:201 and Marx, 1993:292). Guidelines should also clearly spell out the rules for disciplinary action, offences and relevant punishment. The disciplinary process should be followed thoroughly and correctly, according to the processes declared to the employees and the unions (Cookson, 1974:109). Disciplinary procedures are necessary and are formulated because employees do not always behave responsibly and supervisors or management are not always fair and reasonable in the application of discipline (Pigors & Myers, 1964:425).

The "Hot-Stove principle" is very important in the implementation of the disciplinary process. This approach consists of four principles:

- Immediate discipline
- Employee must be warned
- Consistent discipline
- Impersonal discipline (Carrell, et al., 2000:510; Sayless & Strauss, 1977:117 and Sherman & Bohlander, 1992:54).

The disciplinary process with all the relevant procedures is initiated by management as a reaction to the unacceptable job performance or action of employees (Nel, 2001a:155).

## 3.9.6  Managing conflict

Conflict is a natural ingredient of human existence. Therefore school principals must understand conflict and obtain the necessary skills to be able to manage it. School principals must not try and solve all conflict situations in the school, but rather manage conflict in such a manner that it will lead to maximizing constructive conflict and minimizing destructive conflict (Lindelow, 1983:275-176). Conflict is a general occurrence in schools, because the nature of education and school causes conflict (Ngcobo, 2003a:187).

### 3.9.6.1  Description of conflict

Conflict is described by Lindelow (1983:276-277) as a clash, competition of mutual interference of opposing or incompatible forces or qualities. In other words, it is a form of opposition or antagonistic interaction. It is therefore much more than just normal differences or confrontations, but rather leads to action that is potentially destructive with regard to persons, institutions, property and systems. It manifests in the view where two or more people believe that the behaviour of others prevents them from achieving their own goals (Ngcobo, 2003a:188).

### 3.9.6.2  Principles with regard to successful conflict resolution

According to Van der Merwe (2003a:33) the following basic principles can serve as guidelines for school principals in managing conflict successfully:

- Separate the person and the problem.
- Look for an intelligent, well-considered solution.
- Formulate objective criteria that can serve as benchmarks for successful conflict management.
- Stay calm and in control when handling conflict.

### 3.9.6.3  Causes of conflict

Lindelow (1983:279) states that the three main causes of conflict in schools are communication problems (within the school as well as external communication);

functioning and compilation of organisational structure and human (like personality). Ngcobo (2003a:189) views the clash of personalities in schools as one of the most important causes of conflict, because of the difference in people's values and perceptions.

### 3.9.6.4  Resolving conflict

The objective of conflict management is conflict resolution, as it is more beneficial to schools than merely controlling conflict. The first step in conflict resolution is to be aware of the existence of conflict and to address it as soon as possible in order to minimise staff intrigue and prevent power-plays. Consequently the factors that cause conflict to escalate or de-escalate need to be investigated.

Conflict escalates when:
- parties who were not part of the original conflict, start getting involved and choosing sides;
- both or one of the parties feel threatened;
- a history of bad relationships between the parties exists and these parties are not truly attuned to getting along with one another;
- one or both parties have a win-lose attitude.

Conflict de-escalates when:
- focus is placed on the problem rather than on the other party;
- a win-win attitude is visible;
- different needs are openly discussed;
- the parties are in possession of the necessary skills to bring about peace.

The school principal can make use of two tools in defusing the conflict, namely:

- **Negotiations**

Negotiations entail a one-on-one communication between parties where neither of the parties is powerful enough to force his/her will on the other. The conflict is usually resolved when parties voluntarily negotiate an agreement that serves the interests of both.

- **Arbitration**

Arbitration takes place as a last resort if the parties cannot or will not come to a compromise and a third party gets involved in order to resolve the conflict.

School principals must realise that the occurrence of conflict in schools does not reflect on their leadership abilities or on the functioning of the school. Ineffectiveness occurs when conflict is not resolved in a beneficial manner. School principals must therefore commit themselves to the dynamic process of conflict in order to prevent unnecessary conflict and to resolve conflict that could not have occurred previously in such a way that it is to the benefit of all parties and eventually the school (Ngcobo, 2003a:196-198).

## 3.9.7 Termination of service

Termination of service can take place as a result of different actions and can be achieved in different ways. These reasons and ways will be summarised.

### 3.9.7.1 Dismissal

Dismissal is the termination of the services of the employee by the organisation and comes down to a division between the employer and employee resulting from the action of the employee who broke certain rules or performed badly (Parisi, 1972:65.3 and French, 1974:346).

### 3.9.7.2 Resignation

Resignation is initiated by the employee, but care should be taken to find out if it could not have been prevented and the resignation should be analysed in terms of the impact on the organisation (Parisi, 1972:65.1 and French, 1974:344).

### 3.9.7.3 Retirement

Retirement is a great transitional phase in anyone's life. It is normally initiated by the employee, but could also be the result of lay-offs. An important aspect is pre-retirement counselling for employees who retire (Halloren, 1983:408; Carrell, et al., 2000:244; Cascio, 1995:10 and Merkel 1972:47.10).

### 3.9.7.4 Lay-offs

The objective of the lay-off of an employee is to lessen financial pressure on the organisation, in other words, economical reasons lead to lay-offs (French, 1974:345 and Cascio, 1995:513).

Lay-offs are initiated by the employer and could be a temporary or permanent removal off the payroll of the organisation ( Parisi, 1972:65.8 and French, 1974:345).

### 3.9.7.5 Other job terminations

Parisi (1972:65.8 & 65.11) states that termination could also take place where employees die and in the case of the employees who are not able to perform their job as a result of health reasons.

### 3.9.7.6 Exit-interview

Exit-interviews are used to collect information to determine the causes of labour turnover and is very useful in identifying problem areas and making decisions as a result of the exit-interviews, although information obtained from an exit-interview is not always trustworthy. The exit-interview could also be used to ensure that all assets of the organisation has been handed back and that all benefits are discontinued, but it should not be used to try and convince an employee who has resigned, to stay on, because it should have already been done during the time when notice regarding the resignation was given (French, 1974:345 and Armstrong, 1996:501).

The exit-interview of employees who are dismissed should make the departure as dignified and pleasant as possible. The employee could also be given the opportunity to state again his/her side of the matter (Lopez, 1975:329). The FSDoE maintains the policy that any employee who resigns must be provided with a questionnaire to be completed regarding the resignation and must also be given the opportunity for an exit-interview (Free State Department of Education, 2001c:37).

## 3.10  HEALTH AND SAFETY MANAGEMENT

### 3.10.1  Introduction

Top management must ensure a safe and healthy environment for employees (Pigors & Myers, 1965:568). It should be ensured that non-employees are not exposed to

health and safety risks. This includes non-employees like contractors, visitors, people working or living near the terrain and transport routes of the organisation's vehicles (Business Risk Solutions, 2002:10). Schools could also, according to the Occupational Health and Safety Act, No. 85 of 1993, be forced to ensure that all regulations of the school are being kept (Erasmus & Van der Westhuizen, 1996:237). It should therefore be ensured that the working conditions are free of dangers and risks that could threaten the health and safety of employees (Andrews, 1985:24).

Health and safety management is often neglected as an HR management task and responsibility (Bratton, 1999b:128). Novit (1979:12) sees it as an important management function and much emphasis is placed on the employee as valuable asset combined with protection by HR policy (Bratton, 1999b:128). Effective health and safety management can ensure a satisfied and productive working force (Stone, 1982:428).

The dramatic impact of accidents leads to the fact that more emphasis is placed on safety and health (Chruden & Sherman, 1984:499). It is, however, not the correct approach, because safety and health, as well as security in the workplace as an additional aspect, are closely related and should be viewed as of equal importance for employees, specifically in schools.

## 3.10.2 Relationship between health and safety management and other human resources functions

The relationship between health and safety management and other human resources functions will now be discussed briefly according to Stone (1982:428).

- Selection          - select an employee that is physically and spiritually able to perform the job.
- Training           - train employees in terms of safe action and procedures.
- Job analysis       - identify the jobs that could have negative effects for employees.
- Recruitment        - recruitment and retention of staff are promoted in an organisation that sees the health and safety of

|   |   |   | employees as important. |
| --- | --- | --- | --- |
| • | Benefits | - | protection of employees by making provision in terms of death, disability, medical expenses and unemployment. |
| • | Labour relations | - | the relationship between management and employees can sour if there are concerns about health and safety. |

## 3.10.3  Health management

Novit (1979:12) describes health management as the role that the working conditions play in causing health problems and illnesses of the employee, with Mathis and Jackson (2000:530) viewing the physical, spiritual and emotional well-being of employees as important.

Occupational Health awareness is a preventative process that investigates the status of health in the organisation and occupies itself with the transformation of unhealthy conditions into healthy conditions. Employees must also be made aware of health issues and health conscious behaviour that is aware of the importance of health should be encouraged (Domsch & Harms, 1997:252-253).

HRM can support employees by means of employee assistance programmes and employee wellness programmes. Employee assistance programmes give assistance to employees in terms of substance abuse and similar problems (Mathis & Jackson, 2000:13). Examples of problems with which people have to cope, include alcoholism, stress, mental health, job burnout, smoking and aids (Beach, 1985:540-545 and Carrell, et al., 2000:418-435). Stress is seen as one of the most important factors leading to job dissatisfaction, low work performance, low productivity, absenteeism and labour turnover. It plays a significant role in the teaching profession and school principals need firstly to manage their own stress, which is mostly caused by the increased school-based management system and they must also manage the school as a whole so that stress levels for staff are kept within manageable levels (Van der Merwe, 2003b:49). Employee wellness programmes aim at promoting a healthy lifestyle and exercise amongst employees (Mathis & Jackson, 2000:13).  Another way of promoting a healthy lifestyle amongst employees is to distribute health

questionnaires to make employees aware of possible illnesses like, amongst others, cancer, glaucoma and diabetes (Burbank, 1972:49.10).

### 3.10.4  Safety management

Safety entails the removal of accidents and injuries in the workplace so that the physical well-being of employees are ensured (Mathis & Jackson, 2000:13 & 530).

According to Gardner (1972:48.6) there are important preventative measures applicable to safety management.

- Inspection of new equipment, machinery and materials before use.
- Continuous inspection of the above to remove dangerous situations.
- Observation of employee behaviour in order to identify possibly dangerous behaviour.

The above measures can be linked to the approaches followed by Sayles and Strauss (1977:462) in promoting safety.

- The engineering approach focuses on the physical conditions within which work is done.
- The selection approach concentrates on the individual personality of employees who have to do the work.

An important aspect of safety management is that everyone in the organisation should be motivated to promote safety (Chruden & Sherman, 1984:496). A need should be cultivated in employees to work safely (Dessler, 1981:497), with the removal of accidents by focusing on the three "E's" of safety management, namely engineering, education and enforcement of safety rules (Carrell, et al., 2000:438 and Beach, 1985:48).

### 3.10.5  Security

Security in the workplace is very relevant as a result of violence in the workplace. It should be ensured that there is no unauthorized access to the facility and machinery and that employees are protected while they are working or on job assignments (Mathis & Jackson, 2000:13 & 530). Security and safety in terms of theft, sabotage,

rebellion, fire and access control, according to Crane (1979:520), is of extreme importance in the workplace.

## 3.11  HUMAN RESOURCES ADMINISTRATION

### 3.11.1  Introduction

The human resources department of any organisation spends much time in the administration of staff matters (Marx, 1993:381). The system of record-keeping used should contain all information regarding individual employees and be able to provide the necessary information needed for decision-making (Armstrong, 1996:863). This administrative process should be updated and staff files should be kept, because the HR department must supply the whole organisation with information regarding employees and ensure constant updating of information so that correct decision-making can take place (Marx, 1993:381).

Klatt, et al. (1985:635) identify three types of human resources information systems (HRIS):

- Manual systems with manually operated files that are used in smaller organisations and disadvantaged bigger organisations.
- Computerized files and data processing used in most progressive organisations.
- Fully computerized systems with data-based management systems used in most big organisations.

In the present long-term strategic planning much emphasis is placed on the role played by the human resources function. Therefore a simple human resources record-keeping system is not sufficient to support the important role played by the human resources department. Computerized human resources information systems (HRIS) is an important management tool used to integrate human resources fully with long-term strategic planning. HRIS are responsible for the collection, storing, recording, analysing and finding of all data regarding human resources in the organisation (Carrell, et al., 2000:530). Most organisations use computerized systems with manual records that only include the application form, contract of employment and administrative records (Armstrong, 1996:863).

Information regarding the human resources department is stored in two sections, namely individual data and collective data (Armstrong, 1996:863).

## 3.11.2 Individual data

- Application form containing personal information and qualifications.
- Employment history including transfers, promotions and change of jobs.
- Inventory regarding skills and competencies.
- Training, development and education records and career plans.
- Performance assistance and performance appraisal as well as counselling sessions.
- Salary information including benefits and compensation plans.
- Leave records.
- Records regarding absenteeism, tardiness, accidents, medical and disciplinary matters with details of warnings and suspensions.
- Records of termination of employment including details regarding the exit-interview and possible re-employment (Armstrong, 1996:863-864; Klatt, et al., 1985:635 and Stone, 1982:98).

## 3.11.3 Collective data

- Numbers, grading and job description of employees.
- Skills audit.
- Records regarding absenteeism, labour turnover and statistics regarding tardiness.
- Accident records.
- Time periods of service contributions.
- Loans and salary records.
- Employee costs.
- Overtime statistics.
- Records of grievances and disputes.
- Training records (Armstrong, 1996:384).

The type and complexity of the HR administration system is determined by the type and the needs of the organisations.

### 3.11.4   Requirements for an effective management information system in a school

An information system must comply with the following requirements to be effective:

- All users must share in the development and maintenance of the system so that it is broadly accepted and used.

- Information must be made available in an effective and functional manner.

- The system must be cost-effective to warrant the cost involved.

- A reliable system must have built-in safety measures to ensure integrity and security of information. It must also be reliable in terms of accuracy and effectiveness.

- It must show adaptability to new trends or improvements.

- The system must be "user-friendly" and easy to manage (Kruger, 2003b:228).

## 3.12   CONCLUSION

The school principal's role in HRM has become much clearer in this chapter that deals with the maintenance of HR. It is very clear that the goals of the school as organisation cannot be achieved if the school principal does not ensure that the total staff of the school are properly cared for. The proper and professional management of the maintenance of staff in schools will enable the school principal to be a successful HR manager.

In the following chapter the empirical investigation will be described and the analysis and interpretation of research results will be done by the measurement of frequencies.

# CHAPTER 4

# EMPIRICAL RESEARCH

## 4.1  INTRODUCTION

The preceding literature study describes HRM as a management function with specific reference to HRM as a management task of school principals.  This chapter describes empirical research that focuses on HRM as a management task of school principals.  The chapter consists of two main components, namely a description of the empirical course of the research and the analysis and interpretation of data acquired by means of an empirical investigation.  The analysis and interpretation of the data will focus on data frequencies.

## 4.2  DESCRIPTION OF EMPIRICAL RESEARCH METHODOLOGY

Firstly, the goal of the empirical investigation is stated and thereafter the questionnaire is discussed as a measurement instrument.  The population, sampling methods and administrative procedures are also discussed.  Furthermore, the statistical techniques for the interpretation of the data are described.

### 4.2.1  Purpose of the empirical research

Wallen and Fraenkel (1991:4) see empirical research as research that involves the collection of first-hand information. De Wet, Monteith, Venter and Steyn (1981: 4) consider empirical research to be the most fruitful method of obtaining knowledge in the field of education.  The main objective of the empirical investigation was to collect data relevant to the HRM task of school principals in the Free State Province.  The personal profile of the school principal, specific information regarding the school and the different facets of the HRM task of the school principal were focused on.  The data, collected by means of a questionnaire, was interpreted to provide information regarding the execution of the HRM task of the school principal.

## 4.2.2  Measurement instrument

According to Vockell (1983: 354), a measurement instrument is a device or action plan to execute the measurement process.  The choice of a measurement instrument for quantitative research is influenced by the purpose of the study (Gall, Borg & Gall, 1996: 246).  Wolf (1988: 480) contends that the chosen method for data collection depends on:

- the nature of variables under study;
- the nature of the target population;
- the resources available.

The most applicable measurement instrument must then be selected from the available alternatives (Gay, 1981:109).  For the purpose of this study, the questionnaire was selected as the method of research.  The explanation why the questionnaire was selected for the goal of this research follows.

### 4.2.2.1  The questionnaire as research instrument

A questionnaire (Appendix C) was used in this study to obtain information from school principals in the Free State Province regarding their HRM task.  Wolf (1997: 422) describes a questionnaire as a self-reporting instrument that can be used to gather specific information with regard to variables that interest the researcher. Wiersma (1969: 274) refers to a questionnaire as a written, self-administered interview. Although much critique is leveled against the questionnaire as a method of obtaining information, particularly if misused (Hopkins, 1980: 296), to the point that Best (1981: 168) calls it a lazy man's way of gaining information. McMillan and Schumacher (1989: 41) maintain that it is still a good, general technique to obtain information in the field of education research.

A questionnaire consists of a number of questions or items on paper that respondents read and answer (Wolf, 1997: 422).  Information gathered in this way is then converted into data.

The use of the questionnaire as measurement instrument is based on the following three assumptions:

- the respondent can read and understand the questions;
- the respondent is equipped with the required knowledge to answer the questions;
- the respondent will answer the questions or respond to the items honestly (Wolf, 1988: 479).

The questionnaire is normally designed for use with a selected sample (Johnson, 1977: 151) and the questionnaire in this study was distributed to school principals in the Free State Province based on the assumption that the school principals constituting the sample would want to make a contribution towards research regarding their complicated HRM task.

### 4.2.2.2 Construction of questionnaire items

For the purpose of this study the questionnaire consists of closed form questions, although an option "other" where necessary was provided to be used by respondents. Closed form questions provide predetermined, given responses from which the respondent must choose (Best, 1981:169 and Gall, et al., 1996: 295). Questions where all possible alternative responses do not appear, feature an "other" response alternative, where respondents can support own opinions in their own words (Gay, 1981: 160).

Closed form questions are seen to have a high user-value for the following reasons (Best, 1981: 169):
- they are easy to complete;
- they take little time;
- they keep the respondent focused on the topic;
- they appear relatively objective;
- they are easy to table and analyse.

### 4.2.3 Pilot study

Various authors (Sax, 1979: 258; Tuckman, 1988: 233; Gay,1981: 163; Borg & Gall, 1974: 204 and Ary, Jacobs & Razavieh., 1990: 428) emphasise the use of a pilot study before the questionnaire is posted. Tuckman (1988: 237) contends that a pilot study should be performed on a number of respondents from the population who do

not form part of the sample.  The purpose of this is to ensure that respondents will understand the directions provided as well as the questions.  The pilot study is further used to determine if answers provided are clear and easy to use and if there are other technical changes to be made.  All this is necessary to ensure the highest possible degree of reliability and validity of the results ( Huysamen, 1994:205-206).

Ary, et al. (1990: 428) feel that the questionnaire should be presented to colleagues with knowledge of the field of study.  Sax (1979: 258) recommends that the researcher administer the pilot study personally with a small group.

Bell (2002: 128) provides a list of the following questions that respondents who form part of the pilot study can be asked:

- How long did it take you to complete the questionnaire?
- Were the instructions clear?
- Were any of the questions unclear or ambiguous?  If so, which ones and why?
- Did you have any objections to answering any of the questions?
- In your opinion, was anything important omitted?
- Was the layout of the questionnaire clear and attractive?
- Any comments?

Six school principals were used as respondents for the pilot study. These respondents were all chosen on the basis of availability for participation in the pilot study from the Motheo Education District because of their geographical accessibility.  The group included two respondents whose home language is neither Afrikaans nor English.

The researcher visited the respondents personally and handed them the questionnaire for completion.  Respondents were asked to record how long it took them to complete the questionnaire and to make notes for possible comments.  Afterwards, the researcher again visited respondents personally.

The six respondents forming the pilot study were individually interviewed.  The respondents were asked the questions formulated by Bell (2002:128) and their individual responses are set out in Table 4.1.

***Table 4.1:    Results of pilot study***

| Question no. | Question | Responses (N = 6) | | | | | |
|---|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4 | 5 | 6 |
| 1. | How long did it take you to complete the questionnaire? (in minutes) | 13 | 12 | 20 | 10 | 15 | 10 |
| 2. | Were the instructions clear? | Yes | Yes | Yes | Yes | Yes | Yes |
| 3. | Were any of the questions unclear or ambiguous? If so, which and why? | No * | No | No | No | No | No |
| 4. | Did you object to answering any of the questions? | No | No | No | No | No | No |
| 5. | Was any major topic omitted? | No | No | No | No | No | No |
| 6. | Was the layout of the questionnaire clear and attractive? | Yes | Yes | Yes | Yes | Yes | Yes |
| 7. | Was the questionnaire easy to complete? | Yes | Yes | Yes | Yes | Yes | Yes |
| 8. | Any other comments? | No | No | No | No | No | Yes ** |

*   Add "orientation" to "induction" to make it clear

** Very interesting

On the grounds of the pilot study the suggested changes were made and the time needed to complete the questionnaire was set at 12 minutes by eliminating the longest and shortest times of the respondents and finding the average of the remaining four respondents' completion times.

After the pilot study was completed, the questionnaire was presented to the study leader for final approval.  The questionnaire was then presented to the Free State Department of Education to obtain their permission to circulate the questionnaire to schools  principals  in  the  Free  State  Province  (Appendix  B).    Specific

recommendations were made by the Chief Director: Education Development and Professional Services, and these were considered for the final draft of the questionnaire, Appendix C. The questionnaire was then prepared for distribution.

## 4.2.4  Distribution of the questionnaire

This section takes a brief look at the composition of the cover letter and the posting of the questionnaire.

### 4.2.4.1  Cover letter

The importance of the cover letter is emphasised by Ary, et al. (1990: 420) and Gall, et al. (1996: 299-300).  The cover letter, Annexure A (Letter from study leader) and B (Letter of permission by FSDoE), are used to introduce the respondent to the questionnaire (Ary, et al., 1990: 429). This gives the respondent reason to complete the questionnaire (Borg & Gall, 1974: 204).  The following aspects should be addressed by the cover letter:

- the purpose of the study;
- an appeal for cooperation;
- protection of respondents with regard to confidentiality;
- sponsorship for study, where applicable;
- availability of research results;
- expression of appreciation for respondent;
- a date for the letter that is close to the posting date (Ary, et al., 1990: 429-431; Gall, et al., 1996: 299-300 and Sax, 1979: 258).

According to Ary, et al. (1990: 431) the cover letter should be as concise as possible and sent out with the stamped envelope.  The cover letter consisted of a letter from the study leader on a university letterhead and a permission letter from the Free State Department of Education on a Departmental letterhead.  A copy of the cover letter is provided in Appendix A and B.

### 4.2.4.2  Posting of the questionnaire

The questionnaire was posted to members of the sample population together with the cover letter as discussed in the previous paragraph.

## 4.2.5  Population

Cates (1985: 55) describes population as a large group of individuals, objects or events identified by the researcher on the basis of selected traits, attributes and characteristics. The population for this study consists of all school principals from public schools in the Free State Province, excluding school principals from farm schools. The EMIS section of the FSDoE provided the researcher with the information of all 919 public schools in the Free State Province.  These schools are divided into five education districts and this division is indicated in Table 4.2.

*Table 4.2:   Free State Department of Education: schools per education district (excluding farm schools)*

| Education Districts | Number of schools |
|---|:---:|
| Xhariep | 58 |
| Motheo | 263 |
| Lejweleputswa | 181 |
| Thabo Mofutsanyana | 270 |
| Northern Free State | 147 |
| **Total** | **919** |

## 4.2.6  Sample

Cates (1985: 55) describes a sample as a smaller group drawn from the population. The sample is seen to be representative of the population (Borg & Gall, 1974: 115) if a given sample is drawn from a specific population.  Sax (1979: 183) contends that a random sample has been drawn if each member of the population has an equal chance for inclusion in the sample.  This means that no population element can consciously or accidentally be left out of a sample.

Gall, et al. (1996: 229) recommend that the largest possible sample be used in quantitative research, but financial and time restrictions should be kept in mind. Lawson (1997: 131-132) contends that although a large sample is preferable to a small sample, this does not mean that a smaller sample is valueless.  From Strydom and De Vos (1998: 192-193) it is apparent that a sample from a population of 1000 can be as small as 14%.  For the purpose of this empirical investigation, however, the sample was made as large as possible, keeping financial and time restrictions in mind.

A random sample of 500 (54,4%) school principals was drawn to ensure that each of the education districts would be proportionally represented and that each of the 919 school principals would have an equal chance to be included. The construction of the sample according to the number of possible respondents per education district is set out in Table 4.3

*Table 4.3: Number of school principals according to education districts included in the sample*

| Education Districts | Number of school principals | Percentage of the total |
|---|---|---|
| Xhariep | 32 | 55,2% |
| Motheo | 143 | 54,4% |
| Lejweleputswa | 98 | 54,1% |
| Thabo Mofutsanyana | 147 | 54,4% |
| Northern Free State | 80 | 54,4% |
| **Total Sample** | **500** | **54,4%** |

## 4.2.7  Response rate

One of the biggest problems with a questionnaire according to Borg (1981: 86 and Ary, et al., 1990: 432) is to get a sufficient response rate, because non-responses are characteristic of questionnaires.  Writers and researchers disagree about the feedback that can be expected.  Fouché (1998: 153) is of the opinion that a response rate of 50% is sufficient, with Borg (1981: 86) seeing a response rate of less than 70% as inadequate.  Tuckman (1988: 247) contends that if fewer than 80% of respondents react, alternative attempts must be made to obtain data from non-respondents.  Ary, et al. (1990: 432) also feel that non-respondents should be contacted if the response rate is less than 75%.  Gay (1981: 165) considers a response rate of 60% as low.  Ross and Rust (1997: 437) state clearly, however, that no general rule exists with regard to safe frequency of feedback.

The 500 questionnaires of this survey were posted directly to the selected school principals. A standard envelope accompanied each questionnaire to expedite feedback. It was, however, attempted to expedite feedback further by contacting school principals telephonically before the post-back date to make them aware of the questionnaire. The response rate is indicated in Table 4.4.

**Table 4.4:    Response rate of education districts**

| Education Districts | Questionnaires sent out | | Questionnaires received back | | Questionnaires usable | |
|---|---|---|---|---|---|---|
| | Number | Percentage | Number | Percentage | Number | Percentage |
| Xhariep | 32 | 100,0 | 25 | 78,1 | 21 | 65,6 |
| Motheo | 143 | 100,0 | 89 | 62,2 | 80 | 55,9 |
| Lejweleputswa | 98 | 100,0 | 67 | 68,4 | 57 | 58,2 |
| Thabo Mofutsanyana | 147 | 100,0 | 95 | 64,6 | 79 | 53,7 |
| Northern Free State | 80 | 100,0 | 55 | 68,8 | 43 | 53,8 |
| **Total: Free State Province** | **500** | **100,0** | **331** | **66,2** | **280** | **56,0** |

The sample of 500 school principals, representing 54,4% of the total population of 919 schools, excluding farm schools, is a big enough sample. Furthermore, the response rate of 66,2% and the usable rate of 56,0%, representing 30,5% of the total population, is regarded as sufficient. The results can therefore be generalised in terms of the total population.

## 4.2.8  Computation of data

Raw data was computed by the Department of Statistics at the University of the Free State. The statistical Package for their Social Sciences Primer (SPSS Primer) was used to do the computation. The responses in the form of raw data were processed as follows:

- Frequencies with respect to all the questions in the questionnaire were calculated. These results were also expressed in percentages. Although Peil (1982: 185) contends that certain researchers look down upon percentages, the value of it lies in that lay people can understand it easily.

- The mean for various combinations of raw data was calculated and forms the basis for the computation. The mean can be described as "the most common measure of central tendency of variables measured at the interval or ratio level. Often referred to as the average, it is merely the sum of the

individual values for each case divided by the number of cases" (Klecka, Nie & Hull, 1975: 62). Peil (1982: 190) describes the mean very simply as "the sum of scores for all the elements divided by the number of elements in the sample." The mean or average score is considered to be the most general measure of central tendency. The mean is seen to be a calculated score aimed at representing all the scores in the distribution (Montelpare, 1999: 4).

- Furthermore, the t-test for correlated means was used to determine the statistical significance of differences between mean scores. This method is described by Gall, Borg and Gall (1996: 172) as "a procedure for determining whether an observed difference between the mean score of two groups on variable X is statistically significant." Statistically speaking, "significant " does not necessarily refer to "importance", but can instead mean "probably true" (Creative Research Systems 2000: 1-3). What is, however, important to remember is that a statistically significant difference does not necessarily mean a big difference (Cancer Guide, 2001: 7).

- To test the reliability of the research results, Cronbach's Alpha Coefficient was calculated for questions 18, 47.1 & 2, 48.1 & 2, 54.1 to 54.9 and 55.1 to 55.9. The Alpha Coefficient covers values from 0 to 1 and is applied to multi-point formatted questions, as in the case of this study. The higher the score, the more reliable the data. A rating of 0,7 is acceptable, although other ratings are also accepted in literature (Santos, 1999: 2-3). The Cronbach Alpha Coefficient tests a model's or survey's internal consistency (Moffatt, 2003: 1) The Cronbach Alpha is moreover not a statistical test, but rather a coefficient of reliability or consistency (Academic Technology Services, s.a.: 1).

## 4.2.9 Reliability of research results

Reliability indicates the accuracy with which the sample represents the accuracy of the broader universe of responses (Thorndike & Thorndike, 1997: 775). This, according to De Vos and Fouché (1998: 85) depend on the accuracy and precision with which the measuring instrument measures. The reliability of a data-gathering instrument or test refers, in general terms, to the degree of consistency the instrument displays in measuring that which it is supposed to measure (Huysamen, 1986: 23). The

Cronbach Alpha Coefficient indicates a measure of internal consistency. It indicates the degree to which all the items in a test measure the same attribute (Huysamen, 1993: 125).

Table 4.5 shows the reliability coefficient of questions 18, 47.1 & 2 and 48.1 & 2 using a 5-point scale.

**Table 4.5:** *Cronbach's Alpha Coefficient for questions on three general HRM tasks of the school principal*

| Question | Reliability Coefficient |
|---|---|
| Question 18 | 0,8667 |
| Question 47.1 & 47.2 | 0,8343 |
| Question 48.1 & 48.2 | 0,8692 |

The alpha values for all the questions in table 4.5 are high, indicating high reliability.

Table 4.6 indicates the reliability coefficient of questions 54.1 to 54.9 that also use a 5-point scale.

**Table 4.6:** *Cronbach's Alpha Coefficient for questions regarding training needs of school principals*

| Training needs | Reliability coefficient |
|---|---|
| 54.1 Shortlisting and interviews | 0,9057 |
| 54.2 Career planning of staff | 0,8956 |
| 54.3 Training and development of staff | 0,8922 |
| 54.4 Disciplinary aspects | 0,8959 |
| 54.5 Health and safety management | 0,8990 |
| 54.6 PA for non-educators | 0,9014 |
| 54.7 DAS for educators | 0,8985 |
| 54.8 HR administration | 0,8916 |
| 54.9 Motivational techniques | 0,8972 |
| **Overall** | **0,9078** |

The reliability coefficient of all the HRM tasks is high, ranging from 0,8916 to 0,9057. The overall reliability coefficient is also very high (0,9078).

Table 4.7 indicates the reliability coefficient for questions 55.1 to 55.9 which also use a 5-point scale.

**Table 4.7:** *Cronbach's Alpha Coefficient for the importance of HRM tasks of school principals*

| Importance of HRM tasks | Reliability coefficient |
|---|---|
| 54.1  Shortlisting and interviews | 0,8991 |
| 54.2  Career planning of staff | 0,8831 |
| 54.3  Training and development of staff | 0,8733 |
| 54.4  Disciplinary aspects | 0,8774 |
| 54.5  Health and safety management | 0,8738 |
| 54.6  PA for non-educators | 0,8730 |
| 54.7  DAS for educators | 0,8790 |
| 54.8  HR administration | 0,8755 |
| 54.9  Motivational techniques | 0,8788 |
| **Overall** | **0,8913** |

The reliability coefficients that indicate the importance of the HRM tasks individually are high.  The total reliability coefficient is likewise very high (0,8913).

Table 4.8 shows the reliability coefficient of the respective 23 previous items taken as a whole.  All the questions are taken into account and stand in relation to one another and influence one another.

**Table 4.8:** *Cronbach's Alpha Coefficient for all the items in relation to each other*

| Item no. (Question) | Reliability coefficient |
|---|---|
| 18 | 0,8667 |
| 47.1 | 0,8605 |
| 47.2 | 0,8618 |

| | |
|---|---|
| 48.1 | 0,8702 |
| 48.2 | 0,8680 |
| 54.1 | 0,8508 |
| 54.2 | 0,8496 |
| 54.3 | 0,8477 |
| 54.4 | 0,8491 |
| 54.5 | 0,8501 |
| 54.6 | 0,8500 |
| 54.7 | 0,8508 |
| 54.8 | 0,8484 |
| 54.9 | 0,8507 |
| 55.1 | 0,8620 |
| 55.2 | 0,8570 |
| 55.3 | 0,8557 |
| 55.4 | 0,8561 |
| 55.5 | 0,8547 |
| 55.6 | 0,8552 |
| 55.7 | 0,8546 |
| 55.8 | 0,8554 |
| 55.9 | 0,8576 |
| **Overall** | **0,8614** |

The reliability coefficient of the 23 items in relation with one another, as well as the total reliability coefficient is high, which indicates high internal consistency or reliability of the research.

### 4.2.10 Validity of the research

A measuring instrument is valid if it measures what it is supposed to measure (Zeller, 1997: 822-823; De Vos and Fouché, 1998: 83; Huysamen, 1986: 35). The measuring instrument must also do what it is supposed to do. Validity thus comes down to the supposition that the measuring instrument must measure the concept under investigation and that this measurement be accurate (De Vos & Fouché, 1998: 83).

To ensure valid results, it is imperative that the content of the data-gathering instrument must be representative of the body of knowledge of the scientific field that it covers. Content validity of a test therefore refers to the degree to which the contents of

the test are representative of the applicable body of knowledge (Huysamen, 1993:120). When this is applied to the questionnaire used in this survey it simply means that the contents covered by the questionnaire must be representative of the different aspects of HRM of schools in the Free State Province.

If the contents of the questionnaire are related to the different aspects of HRM as discussed in Chapters 2 and 3, it shows that the content of the questionnaire are indeed representative of the existing body of knowledge of HRM. Furthermore, to ensure accurate measurement the questionnaire used in this survey was presented during a pilot study (cf. 4.2.3). In addition a large sample of respondents selected randomly to be representative of the total target population, was used to ensure valid results. The usable questionnaires returned represented 30,5% of the total population (cf. 4.2.7). Accordingly the results of the survey can be regarded as valid.

The analysis and interpretation of research results will be taken into consideration, with special reference to frequency tables.

## 4.3    ANALYSIS AND INTERPRETATION OF RESEARCH RESULTS

### 4.3.1   Introduction

The purpose of this empirical investigation was to obtain information regarding the HRM task of the school principal in the Free State Province. The HRM task of the school principal will also be considered in the different education districts in the Free State Province. To start with, the analysis and interpretation of the research results will be done by the measurement frequencies for the total group of respondents, as well as the different educational districts. The frequencies will be done in accordance with the four sections of the questionnaire.

### 4.3.2   Personal information of respondents

Questions 1 to 7 were asked about personal information of respondents. This information is represented in Table 4.9.

*Table 4.9: Personal information regarding school principals*

| Personal information of school principals | Free State Province (N = 280) | | Xhariep (N = 21) | | Motheo (N = 80) | | Lejweleputswa (N = 57) | | Thabo Mofutsanyana (N = 79) | | Northern Free State (N = 43) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | f | % | f | % | f | % | f | % | f | % | f | % |
| **Gender** | | | | | | | | | | | | |
| Male | 234 | 83,6 | 18 | 85,7 | 65 | 81,2 | 51 | 89,5 | 60 | 75,9 | 40 | 93,0 |
| Female | 46 | 16,4 | 3 | 14,3 | 15 | 18,8 | 6 | 10,5 | 19 | 24,1 | 3 | 7,0 |
| **Age** | | | | | | | | | | | | |
| 40 and younger | 59 | 21,1 | 9 | 42,9 | 19 | 23,8 | 11 | 19,3 | 12 | 15,2 | 8 | 18,6 |
| older than 40 | 221 | 78,9 | 12 | 57,1 | 61 | 76,2 | 46 | 80,7 | 67 | 84,8 | 35 | 81,4 |
| **Post level** | | | | | | | | | | | | |
| PL 2 | 12 | 4,3 | 1 | 4,8 | 5 | 6,3 | 2 | 3,5 | 4 | 5,1 | 0 | 0 |
| PL 3 | 68 | 24,3 | 7 | 33,3 | 22 | 27,5 | 11 | 19,3 | 15 | 19,0 | 13 | 30,2 |
| PL 4 | 200 | 71,4 | 13 | 61,9 | 53 | 66,2 | 44 | 77,2 | 60 | 75,9 | 30 | 69,8 |
| **B.Ed. (Honours) qualification** | | | | | | | | | | | | |
| No B.Ed. (Honours) | 163 | 58,2 | 15 | 71,4 | 45 | 56,2 | 35 | 61,4 | 45 | 57,0 | 23 | 53,5 |
| B.Ed. (Honours) | 117 | 41,8 | 6 | 28,6 | 35 | 43,8 | 22 | 38,6 | 34 | 43,0 | 20 | 46,5 |
| **HRM qualifications** | | | | | | | | | | | | |
| Yes | 56 | 20,0 | 2 | 9,5 | 15 | 18,8 | 10 | 17,5 | 18 | 22,8 | 11 | 25,6 |
| No | 224 | 80,0 | 19 | 90,5 | 65 | 81,2 | 47 | 82,5 | 61 | 77,2 | 32 | 74,4 |
| **Teaching experience** | | | | | | | | | | | | |
| 20 years and less | 123 | 43,9 | 17 | 66,7 | 35 | 43.8 | 21 | 36,8 | 33 | 41,8 | 20 | 46,5 |
| More than 20 years | 157 | 56,1 | 7 | 33,3 | 45 | 56,2 | 36 | 63,2 | 46 | 58,2 | 23 | 53,5 |
| **Experience as school principal** | | | | | | | | | | | | |
| 10 years and less | 173 | 61,8 | 15 | 71,4 | 50 | 62,5 | 35 | 61,4 | 46 | 58,2 | 27 | 62,8 |
| More than 10 years | 107 | 38,2 | 6 | 28,6 | 30 | 37,5 | 22 | 38,6 | 33 | 41,8 | 16 | 37,2 |

From Table 4.9 the following can be ascertained:

- **Gender of school principals**

The vast majority of school principals in the Free State Province are men (83,6%), with the largest occurrence in the Northern Free State Education District (93,0%), while the largest occurrence of female respondents is found in the Thabo Mofutsanyana Education District (24,1%).

- **Age of school principals**

The age range of respondents in the Free State Province as shown in Table 4.9 indicates that the vast majority of school principals are older than 40 years. In the Xhariep Education District 57,1% of respondents are older than 40 years with 84,8% of respondents in the Thabo Mofutsanyana District older than 40 years.

- **Post level**

Most respondents in the Free State Province (71,4%) were appointed at post level 4, with Lejweleputswa and Thabo Mofutsanyana Education Districts indicating most respondents having been appointed at post level 4.

- **B. Ed. (Honours) qualification**

The abovementioned results in Table 4.9 clearly indicate that 58,2% of respondents are not in possession of a B. Ed. (Honours) postgraduate qualification. The Northern Free State Education District is the education district with the most respondents who are in possession of such a qualification (46,5%) in comparison to other education districts.

- **Human Resources Management qualifications**

Although HRM is an important aspect of the management task of school principals, only 20% of respondents in the Free State Province have obtained a qualification specifically aimed at HRM, with the Xhariep Education District having the least number of respondents with HRM qualifications (9,5%) and the Northern Free State Education District indicating the most respondents in possession of such a qualification (25,6%) in comparison with other education districts.

- **Total teaching experience**

Table 4.9 indicates that most respondents in the Free State Province have more than 20 years of teaching experience, with Xhariep Education District, however, showing an opposing picture with the majority of respondents indicating less than 20 years of teaching experience.

- **Years' experience as school principals**

The years' experience as school principals indicate that respondents with 10 years and less experience as school principal accounts for the majority of respondents (61,8%), with the Xhariep Education District showing the biggest majority in comparison with other education districts. The Thabo Mofutsanyana Education District has the smallest group of respondents indicating 10 years and less of experience as school principals in comparison with other education districts.

## 4.3.3 Information on schools of respondents

### 4.3.3.1 Medium of instruction of schools

This question (question 8) was asked to ascertain the medium of instruction in schools in the Free State Province, as this influences the work load of the school principal in terms of HRM. Table 4.10 indicates the medium of instruction used in schools in the Free State Province.

*Table 4.10: Medium of instruction used in schools in the Free State Province*

| Education Districts | N | Frequency | | | | | Percentage | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Parallel | Afrikaans | English | Sotho | Tswana | Parallel | Afrikaans | English | Sotho | Tswana |
| Xhariep | 21 | 3 | 8 | 10 | 0 | 0 | 14,3 | 38,1 | 47,6 | 0 | 0 |
| Motheo | 80 | 19 | 18 | 38 | 3 | 2 | 23,8 | 22,5 | 47,4 | 3,8 | 2,5 |
| Lejweleputswa | 57 | 14 | 7 | 34 | 2 | 0 | 24,6 | 12,3 | 59,6 | 3,5 | 0 |
| Thabo Mofutsanyana | 79 | 18 | 7 | 48 | 6 | 0 | 22,8 | 8,9 | 60,8 | 7,5 | 0 |
| Northern Free State | 43 | 7 | 8 | 25 | 3 | 0 | 16,3 | 18,6 | 58,1 | 7,0 | 0 |
| **Total: Free State Province** | **280** | **61** | **48** | **155** | **14** | **2** | **21,8** | **17,1** | **55,4** | **5,0** | **0,7** |

A majority of 55,4% of respondents' responses indicate that most schools in the Free State Province use English as medium of instruction.

### 4.3.3.2  Number of learners in schools

The number of learners in a school as determined by question 9, has a definite influence on the HRM task of the school principal, because the more learners, the more staff and the more complex the task of the school principal becomes. The number of learners in schools in the Free State Province is reflected in Table 4.11.

*Table 4.11:  Number of learners in schools*

| Education Districts | N | Frequency | | | Percentage | | |
|---|---|---|---|---|---|---|---|
| | | 1 to 500 | 501 to 1000 | More than 1000 | 1 to 500 | 501 to 1000 | More than 1000 |
| Xhariep | 21 | 12 | 6 | 3 | 57,1 | 28,6 | 14,6 |
| Motheo | 80 | 25 | 39 | 16 | 31,2 | 48,8 | 20,0 |
| Lejweleputswa | 57 | 13 | 33 | 11 | 22,8 | 57,9 | 19,3 |
| Thabo Mofutsanyana | 79 | 46 | 33 | 0 | 58,2 | 41,8 | 0 |
| Northern Free State | 43 | 9 | 27 | 7 | 20,9 | 62,8 | 16,3 |
| **Total:  Free State Province** | **280** | **87** | **138** | **55** | **31,1** | **49,3** | **19,6** |

In the Free State Province the majority of schools have 501 to 1000 learners, with the Northern Free State Education District indicating 62,8% of schools having 501 to 1000 learners.

### 4.3.3.3  Categories of staff

The categories of staff at schools in the Free State Province (question 10) have a definite influence on the HRM task of the school principal as the various categories are managed in different ways and add to the complexity of the HRM task of the school principal. In Table 4.12 the categories of staff in school are shown.

*Table 4.12:   Categories of staff at schools*

| Education Districts | N | Frequency | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | Educators | Support staff | Admin staff | Terrain staff | Hostel staff | Pre-primary | Other |
| Xhariep | 21 | 21 | 4 | 21 | 20 | 8 | 4 | 0 |
| Motheo | 80 | 80 | 13 | 75 | 62 | 10 | 24 | 6 |
| Lejweleputswa | 57 | 57 | 4 | 56 | 46 | 8 | 9 | 2 |
| Thabo Mofutsanyana | 79 | 79 | 5 | 79 | 64 | 13 | 15 | 1 |
| Northern Free State | 43 | 43 | 4 | 43 | 34 | 7 | 10 | 2 |
| **Total:  Free State Province** | **280** | **280** | **30** | **274** | **226** | **46** | **62** | **11** |

The composition of the staff corps of schools differ, but educators, administrative and terrain staff are the most important components.

## 4.3.3.4   Staff numbers

The total number of staff members at schools includes all categories of staff employed at the school. Question 11 is asked in order to determine the real number of staff to be handled by the school principal as HR manager. Table 4.13 shows staff numbers employed at schools.

*Table 4.13:   Total number of staff employed at schools*

| Education Districts | N | Frequency | | | | Percentage | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | 1 to 25 | 26 to 50 | 51 to 75 | More than 75 | 1 to 25 | 26 to 50 | 51 to 75 | 76 to 100 |
| Xhariep | 21 | 13 | 7 | 1 | 0 | 61,9 | 33,3 | 4,8 | 0 |
| Motheo | 80 | 36 | 36 | 7 | 1 | 45,0 | 45,0 | 8,8 | 1,2 |
| Lejweleputswa | 57 | 24 | 33 | 0 | 0 | 42,1 | 57,9 | 0 | 0 |
| Thabo Mofutsanyana | 79 | 37 | 38 | 3 | 1 | 46,8 | 48,1 | 3,8 | 1,3 |
| Northern Free State | 43 | 11 | 32 | 0 | 0 | 25,6 | 74,4 | 0 | 0 |
| **Total:  Free State Province** | **280** | **121** | **146** | **11** | **2** | **43,3** | **52,1** | **3,9** | **0,7** |

The staff of respondents in the Free State Province, in most cases, seems to be in the 26 to 50 interval, with the Northern Free State outstanding where the vast majority of staff numbers are to be found in this interval.

### 4.3.4 Frequencies with regard to the Human Resources Management task of respondents

#### 4.3.4.1 Schools with an HRM policy document

Question 12 is specifically aimed at determining if the school principal is fulfilling the HRM task making use of a structured policy. The appearance of schools with an HRM policy document is shown in Table 4.14.

*Table 4.14:  Availability of an HRM policy document at schools*

| Education Districts | N | Frequency | | Percentage | |
|---|---|---|---|---|---|
| | | Yes | No | Yes | No |
| Xhariep | 21 | 8 | 13 | 38,1 | 61,9 |
| Motheo | 80 | 22 | 58 | 27,5 | 72,5 |
| Lejweleputswa | 57 | 17 | 40 | 29,8 | 70,2 |
| Thabo Mofutsanyana | 79 | 12 | 67 | 15,2 | 84,8 |
| Northern Free State | 43 | 13 | 30 | 30,2 | 69,8 |
| **Total:  Free State Province** | **280** | **72** | **208** | **25,7** | **74,3** |

Respondents overwhelmingly indicated that their HRM task is not fulfilled according to a HRM policy document (74,3%). Thabo Mofutsanyana is the education district where an HRM policy document is the least available and therefore the least in use.

#### 4.3.4.2 Current and future shortage of educators

Question 13 and 14 are asked to determine if school principals are presently experiencing a shortage of educators in specific subjects or if a shortage of educators is foreseen in future in the so-called scarce subjects. This response is indicated in Table 4.15.

*Table 4.15:   Current and future shortages of educators*

| Current and future educator shortages | Free State Province (N = 280) | | Xhariep (N = 21) | | Motheo (N = 80) | | Lejweleputswa (N = 57) | | Thabo Mofutsanyana (N = 79) | | Northern Free State (N = 43) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | f | % | f | % | f | % | f | % | f | % | f | % |
| **Current shortages** | | | | | | | | | | | | |
| Yes | 133 | 47,5 | 13 | 61,9 | 37 | 46,2 | 25 | 43,9 | 39 | 49,4 | 19 | 44,2 |
| No | 147 | 52,5 | 8 | 38,1 | 43 | 53,8 | 32 | 56,1 | 40 | 50,6 | 24 | 55,8 |
| **Future shortages** | | | | | | | | | | | | |
| Yes | 153 | 54,6 | 16 | 76,2 | 40 | 50,0 | 30 | 52,6 | 39 | 49,4 | 28 | 65,1 |
| No | 127 | 45,4 | 5 | 23,8 | 40 | 50,0 | 27 | 47,4 | 40 | 50,6 | 15 | 34,9 |

A shortage of educators in specific subjects are being experienced at 47,5% of schools in the Free State Province, with the Xhariep Education District experiencing the most problems. Respondents are furthermore of the opinion that a shortage of educators in specific subjects will be experienced in 54,6% of schools in the Free State Province in the future, with the Xhariep Education District again expecting the biggest future problem.

### 4.3.4.3  SGB involvement in the training of educators at pre-graduate level

Question 15 aims at ascertaining if SGB's are ensuring a regulated flow of educators in scarce subjects by means of bursaries to students of education in specific subjects. These bursaries are financed from the school's financial account, administered by SGB.  Table 4.16 indicates the results of this question.

*Table 4.16:   SGB involvement in educator training at pre-graduate level*

| Education Districts | N | Frequency | | Percentage | |
|---|---|---|---|---|---|
| | | Yes | No | Yes | No |
| Xhariep | 21 | 1 | 20 | 4,8 | 95,2 |
| Motheo | 80 | 5 | 75 | 6,2 | 93,8 |
| Lejweleputswa | 57 | 3 | 54 | 5,3 | 94,7 |
| Thabo Mofutsanyana | 79 | 1 | 78 | 1,3 | 98,7 |
| Northern Free State | 43 | 3 | 40 | 7,0 | 93,0 |
| **Total:  Free State Province** | **280** | **13** | **267** | **4,6** | **95,4** |

Only 4,6% of schools' SGB's in the Free State Province are involved in such a project.

### 4.3.4.4  Advertisement of posts

By using the responses to question 16 it can be determined if posts additional to the Departmental vacancy list are advertised in order to ensure a wider base of applications. Table 4.17 indicates the usage of additional advertisement of Departmental vacancies.

*Table 4.17:   Additional advertisement of vacancies at schools*

| Education Districts | N | Frequency | | Percentage | |
|---|---|---|---|---|---|
| | | Yes | No | Yes | No |
| Xhariep | 21 | 4 | 17 | 19,0 | 81,0 |
| Motheo | 80 | 11 | 69 | 13,8 | 86,3 |
| Lejweleputswa | 57 | 13 | 44 | 22,8 | 77,2 |
| Thabo Mofutsanyana | 79 | 22 | 57 | 27,8 | 72,2 |
| Northern Free State | 43 | 13 | 30 | 30,2 | 69,8 |
| **Total:  Free State Province** | **280** | **63** | **217** | **22,5** | **77,5** |

From the responses in Table 4.17 it is clear that few schools in the Free State Province (22,5%) advertise vacancies in the media additional to the Departmental vacancy lists.

### 4.3.4.5 Unofficial applications

Question 17 is used to ascertain if school principals in the Free State Province come in contact with walk-in, write-in and phone-in candidates in their schools. The responses to this question are indicated in Table 4.18.

*Table 4.18: Walk-in, write-in and phone-in applications*

| Education Districts | N | Frequency | | Percentage | |
|---|---|---|---|---|---|
| | | Yes | No | Yes | No |
| Xhariep | 21 | 12 | 9 | 57,1 | 42,9 |
| Motheo | 80 | 64 | 16 | 80,0 | 20,0 |
| Lejweleputswa | 57 | 49 | 8 | 86,0 | 14,0 |
| Thabo Mofutsanyana | 79 | 58 | 21 | 73,4 | 26,6 |
| Northern Free State | 43 | 40 | 3 | 93,0 | 7,0 |
| **Total: Free State Province** | **280** | **223** | **57** | **79,6** | **20,4** |

Most respondents in the Free State Province (79,6%) indicated that they receive such applications at their schools. Respondents in the Northern Free State Education District showed the highest number of such applications.

### 4.3.4.6 Reception of walk-ins

Question 18 aims at determining if school principals receive walk-ins as possible candidates in a personal capacity. The spread of results is shown in Table 4.19.

*Table 4.19: Personal reception of walk-ins as potential candidates*

| Education Districts | N | Frequency | | | | | Percentage | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Always | Often | Sometimes | Seldom | Never | Always | Often | Sometimes | Seldom | Never |
| Xhariep | 21 | 6 | 4 | 4 | 4 | 3 | 28,7 | 19,0 | 19,0 | 19,0 | 14,3 |
| Motheo | 80 | 18 | 20 | 28 | 7 | 7 | 22,4 | 25,0 | 35,0 | 8,8 | 8,8 |
| Lejweleputswa | 57 | 13 | 16 | 21 | 5 | 2 | 22,8 | 28,1 | 36,8 | 8,8 | 3,5 |
| Thabo Mofutsanyana | 79 | 17 | 8 | 32 | 10 | 12 | 21,5 | 10,1 | 40,5 | 12,7 | 15,2 |
| Northern Free State | 43 | 8 | 8 | 19 | 8 | 0 | 18,6 | 18,6 | 44,2 | 18,6 | 0 |
| **Total: Free State Province** | **280** | **62** | **56** | **104** | **34** | **24** | **22,1** | **20,0** | **37,1** | **12,1** | **8,6** |

In the Free State Province respondents responses showed great variety, with the most respondents receiving such candidates personally at times. Respondents in the Northern Free State Education District showed the highest response of all education districts, indicating that such candidates are "sometimes" received.

### 4.3.4.7  Usage of walk-ins, write-ins and phone-ins as employees

The employment of walk-ins, write-ins and phone-ins at schools in the Free State Province is determined by question 19 with Table 4.20 indicating the employment of such applicants by SGB's.

*Table 4.20:   Walk-ins, write-ins and phone-ins as potential employees*

| Education Districts | N | Frequency | | | Percentage | | |
|---|---|---|---|---|---|---|---|
| | | Yes | Sometimes | No | Yes | Sometimes | No |
| Xhariep | 21 | 5 | 9 | 7 | 23,8 | 42,9 | 33,3 |
| Motheo | 80 | 16 | 35 | 29 | 20,0 | 43,8 | 36,2 |
| Lejweleputswa | 57 | 18 | 18 | 21 | 31,6 | 31,6 | 36,8 |
| Thabo Mofutsanyana | 79 | 29 | 18 | 32 | 36,7 | 22,8 | 40,5 |
| Northern Free State | 43 | 9 | 20 | 14 | 20,9 | 46,5 | 32,6 |
| **Total:  Free State Province** | **280** | **77** | **100** | **103** | **27,5** | **35,7** | **36,8** |

From Table 4.20 it is clear that schools in the Free State Province do not make regular use of these potential candidates. The results in the various education districts show great similarities in this regard.

The biggest usage of such applicants (36,7%) takes place in the Thabo Mofutsanyana Education District.   In the Motheo Education district the smallest usage of such applicants in terms of employment is made.

### 4.3.4.8  Screening of applications

Question 20 is asked to determine if school principals are satisfied with the screening of applications by officials of the FSDoE in terms of conditions set in the Departmental vacancy list.  Table 4.21 indicates the results of this question.

**Table 4.21:   Screening of applications by officials of the FSDoE**

| Education Districts | N | Frequency | | Percentage | |
|---|---|---|---|---|---|
| | | Yes | No | Yes | No |
| Xhariep | 21 | 16 | 5 | 76,2 | 23,8 |
| Motheo | 80 | 43 | 37 | 53,8 | 46,2 |
| Lejweleputswa | 57 | 43 | 14 | 75,4 | 24,6 |
| Thabo Mofutsanyana | 79 | 63 | 16 | 79,7 | 20,3 |
| Northern Free State | 43 | 31 | 12 | 72,1 | 27,9 |
| **Total:  Free State Province** | **280** | **196** | **84** | **70,0** | **30,0** |

Respondents in the Free State Province seem to be satisfied (70%) with the screening process employed by officials of the FSDoE, with respondents in the Thabo Mofutsanyana  Education District indicating the most satisfaction and respondents in the Motheo Education District indicating the least satisfaction.

### 4.3.4.9  Notice procedures for shortlisting and interviews

Notification to unions regarding shortlisting and interviews is an important process that needs to be handled correctly. Question 21 is asked to ascertain who takes responsibility for this important aspect of HRM. The spread is shown in Table 4.22.

**Table 4:22:   Responsibility for notice for shortlisting and interviews**

| Education Districts | N | Frequency | | | Percentage | | |
|---|---|---|---|---|---|---|---|
| | | School principal | SGB | Other | School principal | SGB | Other |
| Xhariep | 21 | 15 | 6 | 0 | 71,4 | 28,6 | 0 |
| Motheo | 80 | 61 | 16 | 3 | 76,2 | 20,0 | 3,8 |
| Lejweleputswa | 57 | 42 | 15 | 0 | 73,7 | 26,3 | 0 |
| Thabo Mofutsanyana | 79 | 51 | 25 | 3 | 64,6 | 31,6 | 3,8 |
| Northern Free State | 43 | 28 | 14 | 1 | 65,1 | 32,6 | 2,3 |
| **Total:  Free State Province** | **280** | **197** | **76** | **7** | **70,4** | **27,1** | **2,5** |

In all five education districts the respondents indicated that the school principal accepts responsibility for notice in terms of shortlisting and interviews. In the Thabo Mofutsanyana and Northern Free State Education District the school principal plays the biggest role, but the role of the SGB is greater in other education districts.

### 4.3.4.10  Setting of questions for interviews

Question 22 wants to indicate who takes responsibility for the setting of questions for interviews, as the interview is a critical step in the selection process and, after sifting has taken place, it is the only selection criteria that can be used in filling vacant posts. The results of this question are indicated in Table 4.23.

*Table 4.23:  Responsibility for the setting of questions for interviews*

| Education Districts | N | Frequency | | | | Percentage | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | School principal | SGB | SMT | Other | School principal | SGB | SMT | Other |
| Xhariep | 21 | 10 | 15 | 8 | 3 | 27,8 | 41,7 | 22,2 | 8,3 |
| Motheo | 80 | 39 | 54 | 34 | 16 | 27,3 | 37,7 | 23,8 | 11,2 |
| Lejweleputswa | 57 | 43 | 41 | 18 | 4 | 40,6 | 38,7 | 17,0 | 3,8 |
| Thabo Mofutsanyana | 79 | 31 | 63 | 18 | 7 | 26,1 | 52,9 | 15,1 | 5,9 |
| Northern Free State | 43 | 19 | 32 | 15 | 2 | 27,9 | 47,1 | 22,1 | 2,9 |
| **Total:  Free State Province** | **280** | **142** | **205** | **93** | **32** | **30,1** | **43,3** | **19,7** | **6,8** |

Table 4.23 indicates that the SGB, SMT and the school principal as an individual, set questions for the interviews collectively. According to respondents in the Free State Province the SGB takes the lead in the setting of questions for interviews, with the school principal in his/her individual capacity also playing a big role. The results of the Lejweleputswa Education District differ from those in other education districts because the school principal in this education district takes the lead in most cases and accepts responsibility for the setting of questions for  interviews.

### 4.3.4.11  Administration of recommendations to fill vacant posts

The administration involved in the recommendations of the SGB in regard to the filling of vacancies is a very important aspect of the selection process. Question 23 wants to

find out who fulfils this important administrative task. Table 4.24 indicates the responses to question 23.

*Table 4.24: Administration of recommendations of the SGB in the filling of vacant Departmental posts*

| Education Districts | N | Frequency | | | | Percentage | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | School principal | SGB | SMT | Other | School principal | SGB | SMT | Other |
| Xhariep | 21 | 16 | 4 | 1 | 0 | 76,2 | 19,0 | 4,8 | 0 |
| Motheo | 80 | 43 | 25 | 6 | 6 | 53,8 | 31,2 | 7,5 | 7,5 |
| Lejweleputswa | 57 | 37 | 18 | 1 | 1 | 64,9 | 31,5 | 1,8 | 1,8 |
| Thabo Mofutsanyana | 79 | 34 | 36 | 3 | 6 | 43,0 | 45,6 | 3,8 | 7,6 |
| Northern Free State | 43 | 17 | 23 | 3 | 0 | 39,5 | 53,5 | 7,0 | 0 |
| **Total:  Free State Province** | **280** | **147** | **106** | **14** | **13** | **52,5** | **37,9** | **5,0** | **4,6** |

The handling of this important HRM task seems, according to the respondents in the Free State Province, to rest on the shoulders of the school principal. In the Xhariep Education District the vast majority of school principals handle this task, with the Northern Free State Education District showing the school principal playing a lesser role.

**4.3.4.12  Induction policy**

By means of question 24 it can be ascertained if an induction policy for new appointments at the school is in existence. The existence of induction policies at schools in the Free State Province is indicated in Table 4.25.

**Table 4.25: Existence of an induction policy for new appointments at schools**

| Education Districts | N | Frequency | | | Percentage | | |
|---|---|---|---|---|---|---|---|
| | | Yes | No | Do not know | Yes | No | Do not know |
| Xhariep | 21 | 9 | 12 | 0 | 42,9 | 57,1 | 0 |
| Motheo | 80 | 40 | 39 | 1 | 50,0 | 48,8 | 1,2 |
| Lejweleputswa | 57 | 18 | 39 | 0 | 31,6 | 68,4 | 0 |
| Thabo Mofutsanyana | 79 | 32 | 46 | 1 | 40,5 | 58,2 | 1,3 |
| Northern Free State | 43 | 21 | 22 | 0 | 48,8 | 51,2 | 0 |
| **Total: Free State Province** | **280** | **120** | **158** | **2** | **42,9** | **56,4** | **0,7** |

In the Free State Province the majority of schools (56,4%) don't have an official induction policy for new appointments, with the Lejweleputswa Education District being the education district with the most respondents indicating that they do not have such a policy (68,4%).

### 4.3.4.13 Induction of new appointments

The induction of new appointments at schools is an important HRM task of the school principal and question 25 is directed at determining if induction of new appointments takes place at schools in the Free State Province. Table 4.26 indicates the induction rate of new appointments at schools.

**Table 4.26: Induction of new appointments at schools**

| Education Districts | N | Frequency | | | Percentage | | |
|---|---|---|---|---|---|---|---|
| | | Yes | No | Do not know | Yes | No | Do not know |
| Xhariep | 21 | 17 | 3 | 1 | 81,0 | 14,2 | 4,8 |
| Motheo | 80 | 64 | 15 | 1 | 80,0 | 18,8 | 1,2 |
| Lejweleputswa | 57 | 47 | 9 | 1 | 82,4 | 15,8 | 1,8 |
| Thabo Mofutsanyana | 79 | 62 | 16 | 1 | 78,5 | 20,3 | 1,2 |
| Northern Free State | 43 | 41 | 2 | 0 | 95,3 | 4,7 | 0 |
| **Total: Free State Province** | **280** | **231** | **45** | **4** | **82,5** | **16,1** | **1,4** |

The vast majority of respondents in the Free State Province (82,5%) indicated that induction of new appointments do take place at their schools with the respondents in the Northern Free State Education District indicating that 95,3% of their schools has an induction process for new appointments.

### 4.3.4.14  Management of the induction process

It is very important that the induction process at schools in the Free State Province be handled professionally and by means of question 26 it is determined who accepts responsibility for the management of the induction process. The spread of responses is shown in Table 4.27.

***Table 4.27:   Management of the induction process in schools***

| Education Districts | N | Frequency | | | | Percentage | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | School principal | Member of SMT | No one | Other | School principal | Member of SMT | No one | Other |
| Xhariep | 21 | 4 | 12 | 2 | 0 | 22,2 | 66,7 | 11,1 | 0 |
| Motheo | 80 | 18 | 41 | 2 | 4 | 27,7 | 63,1 | 3,1 | 6,1 |
| Lejweleputswa | 57 | 12 | 28 | 7 | 1 | 25,0 | 58,3 | 14,6 | 2,1 |
| Thabo Mofutsanyana | 79 | 16 | 37 | 6 | 4 | 25,4 | 58,8 | 9,5 | 6,3 |
| Northern Free State | 43 | 13 | 24 | 4 | 0 | 31,7 | 58,5 | 9,8 | 0 |
| **Total:  Free State Province** | **280** | **63** | **142** | **21** | **9** | **26,8** | **60,4** | **9,0** | **3,8** |

Across the board in all education districts it seems that the management of the induction process is delegated to a senior member of staff who is also a member of the SMT.

### 4.3.4.15  Induction of different staff categories

Question 27 is aimed at ascertaining if a complete induction process takes place in regard to the different categories of staff in schools in the Free State Province. In Table 4.28 it is indicated how different staff categories are being subjected to a complete induction process in schools in the Free State Province.

*Table 4.28: Induction of different staff categories*

| Staff categories | Free State Province | | Xhariep | | Motheo | | Lejweleputswa | | Thabo Mofutsanyana | | Northern Free State | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | f | % | f | % | f | % | f | % | f | % | f | % |
| **Educators** | (N = 240) | | (N = 17) | | (N = 65) | | (N = 50) | | (N = 68) | | (N = 40) | |
| Yes | 199 | 82,9 | 14 | 82,4 | 57 | 87,7 | 35 | 70,0 | 59 | 86,8 | 34 | 85,0 |
| No | 41 | 17,1 | 3 | 17,6 | 8 | 12,3 | 15 | 30,0 | 9 | 13,2 | 6 | 15,0 |
| **Admin Staff** | (N = 237) | | (N =17) | | (N = 63) | | (N = 49) | | (N = 68) | | (N = 40) | |
| Yes | 185 | 78,1 | 13 | 76,5 | 55 | 87,3 | 33 | 67,3 | 54 | 79,4 | 30 | 75,0 |
| No | 52 | 21,9 | 4 | 23,5 | 8 | 12,7 | 16 | 32,7 | 14 | 20,6 | 10 | 25,0 |
| **Terrain staff** | (N = 197) | | (N =16) | | (N = 54) | | (N = 40) | | (N = 55) | | (N = 32) | |
| Yes | 108 | 54,8 | 10 | 62,5 | 33 | 61,1 | 20 | 50,0 | 29 | 52,7 | 16 | 50,0 |
| No | 89 | 45,2 | 6 | 39,5 | 21 | 38,9 | 20 | 50,0 | 26 | 47,3 | 16 | 50,0 |
| **Hostel staff** | (N = 36) | | (N =6) | | (N = 9) | | (N = 5) | | (N = 10) | | (N = 6) | |
| Yes | 22 | 61,1 | 3 | 50,0 | 6 | 66,7 | 2 | 40,0 | 7 | 70,0 | 4 | 66,7 |
| No | 14 | 38,9 | 3 | 50,0 | 3 | 33,3 | 3 | 60,0 | 3 | 30,0 | 2 | 33,3 |

Table 4.28 indicates the following:

- **Induction of educators**

The majority of all respondents in the various education districts indicated that a complete induction process is undertaken with educators. Motheo Education District has the highest response rate with 87,7%.

- **Induction of administrative staff**

Table 4.28 indicates that the respondents in most schools in the Free State Province undertake induction of administrative staff, with the education district showing

induction of administrative staff as the highest priority being the Motheo Education District with 87,3%.

- **Induction of terrain staff**

Although Table 4.28 indicates that a majority of respondents in the Free State Province undertake a complete induction process with terrain staff, it is very clear that it is undertaken in only 54,8% of schools, with respondents in the Xhariep Education District indicating that it takes place in 62,5% of schools.

- **Induction of hostel staff**

Respondents in the Free State Province who have hostels undertake an induction process with staff in the majority of cases (61,1%). The highest level of induction with hostel staff takes place in the Thabo Mofutsanyana Education District (70,0%).

### 4.3.4.16 Training and development policy

By means of question 28 it can be ascertained if the training and development of staff in schools in the Free State Province takes place according to a structured policy. The question views the school principal, SMT, educators and non-educators in separate categories. Table 4.29 indicates if training and development of the different staff categories take place according to a structured policy.

*Table 4.29:   School policy for training and development of staff*

| Staff categories | Free State Province | | Xhariep | | Motheo | | Lejweleputswa | | Thabo Mofutsanyana | | Northern Free State | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | f | % | f | % | f | % | f | % | f | % | f | % |
| **School principal** | (N = 280) | | (N =21) | | (N = 80) | | (N = 57) | | (N = 79) | | (N = 43) | |
| Yes | 52 | 18,6 | 4 | 19,0 | 18 | 22,5 | 7 | 12,3 | 17 | 21,5 | 6 | 14,0 |
| No | 228 | 81,4 | 17 | 81,0 | 62 | 77,5 | 50 | 87,7 | 62 | 78,5 | 37 | 86,0 |

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| SMT's | (N = 280) | | (N =21) | | (N = 80) | | (N = 57) | | (N = 79) | | (N = 43) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Yes | 118 | 42,1 | 7 | 33,3 | 38 | 47,5 | 21 | 36,8 | 32 | 40,5 | 20 | 46,5 |
| No | 162 | 57,9 | 14 | 66,7 | 42 | 52,5 | 36 | 63,2 | 47 | 59,5 | 23 | 53,5 |

| Educators | (N = 280) | | (N =21) | | (N = 80) | | (N = 57) | | (N = 79) | | (N = 43) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Yes | 143 | 51,1 | 10 | 47,6 | 46 | 57,5 | 27 | 47,4 | 39 | 49,4 | 21 | 48,8 |
| No | 137 | 48,9 | 11 | 52,4 | 34 | 42,5 | 30 | 52,6 | 40 | 50,6 | 22 | 51,2 |

| Non-educators | (N = 272) | | (N =21) | | (N = 76) | | (N = 56) | | (N = 77) | | (N = 52) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Yes | 98 | 36,0 | 10 | 47,6 | 31 | 40,8 | 15 | 26,8 | 26 | 33,8 | 16 | 38,1 |
| No | 174 | 64,0 | 11 | 52,4 | 45 | 59,2 | 41 | 73,2 | 51 | 66,2 | 26 | 61,9 |

From Table 4.29 the following can be determined regarding the training and development of staff according to structured policy for training and development.

- **School principals**

The results obtained from Table 4.29 indicates that 81,4% of the respondents in the Free State Province have no policy in schools that can ensure the structured training and development of school principals.

- **SMT's**

Respondents in the Free State Province have indicated that they are in possession of a policy in their schools that facilitates the training and development of SMT's, but the majority of schools do not have such a policy. The response of the Motheo Education District indicated that this education district has the highest level of training and development according to a structured policy.

- **Educators**

From Table 4.29 it is clear that the respondents in the Free State Province gave an equal indication of the existence of a structured policy in regard to the training and development of educators. The Motheo Education District is the only education district where a majority of schools have such a policy (57,5%).

- **Non-educators**

The vast majority of respondents in the Free State Province do not have a policy to manage the training and development of non-educators, with the Xhariep Education District delivering the best results as it is the education district with the most respondents showing that they have such a policy in comparison to the other education districts, namely 52,4%.

### 4.3.4.17  Management of career planning and development

Question 29 is asked to determine who takes responsibility for managing career planning and development in the school. In Table 4.30 the results of this question is indicated.

*Table 4.30:  Management of career planning and development of staff*

| Education Districts | N | Frequency | | | Percentage | | |
|---|---|---|---|---|---|---|---|
| | | School principal | SMT | Other | School principal | SMT | Other |
| Xhariep | 20 | 9 | 6 | 5 | 45,0 | 30,0 | 25,0 |
| Motheo | 76 | 33 | 39 | 4 | 43,3 | 51,3 | 5,3 |
| Lejweleputswa | 57 | 17 | 39 | 1 | 29,8 | 68,4 | 1,8 |
| Thabo Mofutsanyana | 73 | 28 | 42 | 3 | 38,4 | 57,5 | 4,1 |
| Northern Free State | 43 | 14 | 26 | 3 | 32,6 | 60,5 | 6,9 |
| Total:  Free State Province | 269 | 101 | 152 | 16 | 37,5 | 56,5 | 6,0 |

In the Free State Province respondents indicated that senior staff, specifically the SMT, manages this process. In the Lejweleputswa Education District the rate of response was the highest in regard to the SMT managing this process.

### 4.3.4.18  Training and development of SGB's regarding HRM

As SGB's play an important role in regard to HRM in school management, question 30 aims at ascertaining if SGB's are prepared for their HRM task by means of a structured process. Responses regarding the training and development of SGB's for the HRM task is indicated by Table 4.31.

*Table 4.31:  Training and development of SGB's for their HRM task*

| Education Districts | N | Frequency | | Percentage | |
|---|---|---|---|---|---|
| | | Yes | No | Yes | No |
| Xhariep | 21 | 9 | 12 | 42,9 | 57,1 |
| Motheo | 80 | 34 | 46 | 42,5 | 57,5 |
| Lejweleputswa | 57 | 17 | 40 | 29,8 | 70,2 |
| Thabo Mofutsanyana | 79 | 27 | 52 | 34,2 | 65,8 |
| Northern Free State | 43 | 17 | 26 | 39,5 | 60,5 |
| **Total:  Free State Province** | **280** | **104** | **176** | **37,1** | **62,9** |

A low percentage of respondents in the Free State Province (37,1%) indicated that they are in possession of a policy preparing SGB's for their HRM task. Although the best outcomes are indicated in the Xhariep and Motheo Education Districts, most respondents in these education districts indicated that they do no have such a policy.

### 4.3.4.19  School Development Team (SDT)

Question 31 is aimed at determining if schools are in possession of SDT's, as prescribed by the FSDoE. Table 4.32 indicates the results of question 31.

*Table 4.32:   Existence of School Development Teams in schools*

| Education Districts | N | Frequency | | Percentage | |
|---|---|---|---|---|---|
| | | Yes | No | Yes | No |
| Xhariep | 21 | 18 | 3 | 85,7 | 14,3 |
| Motheo | 80 | 53 | 27 | 66,2 | 33,8 |
| Lejweleputswa | 57 | 37 | 20 | 64,9 | 35,1 |
| Thabo Mofutsanyana | 79 | 59 | 20 | 74,7 | 25,3 |
| Northern Free State | 43 | 31 | 12 | 72,1 | 27,9 |
| **Total:  Free State Province** | **280** | **198** | **82** | **70,7** | **29,3** |

The majority of respondents in the Free State Province indicated that their schools are in possession of a SDT. In Xhariep Education District it seems that the SDT's are the

best in place, in comparison with other education districts, with the Lejweleputswa Education District in the weakest position.

### 4.3.4.20  Leadership of the School Development Team (SDT)

The success of the SDT is largely determined by the leadership thereof. By means of question 32 it can be determined who takes responsibility in terms of leadership of the SDT. This spread is shown in Table 4.33.

*Table 4.33:  Chairperson of SDT's in schools*

| Education Districts | N | Frequency | | | Percentage | | |
|---|---|---|---|---|---|---|---|
| | | School principal | Member of SMT | Other | School principal | Member of SMT | Other |
| Xhariep | 18 | 9 | 5 | 4 | 50,0 | 27,8 | 22,2 |
| Motheo | 53 | 30 | 18 | 5 | 56,6 | 34,0 | 9,4 |
| Lejweleputswa | 37 | 22 | 13 | 2 | 59,5 | 35,1 | 5,4 |
| Thabo Mofutsanyana | 59 | 39 | 19 | 1 | 66,1 | 32,2 | 1,7 |
| Northern Free State | 31 | 23 | 6 | 2 | 74,2 | 19,4 | 6,5 |
| **Total:  Free State Province** | **198** | **123** | **61** | **14** | **62,1** | **30,8** | **7,1** |

SDT's in the Free State Province are led by the school principal in the majority of cases, with the Northern Free State Education District being the education district showing most clearly the school principal as the chairperson of the SDT in comparison with other education districts.

### 4.3.4.21  Motivation of staff

The purpose of question 33 is to determine if any motivational sessions are presented to staff, who are indicated separately in two categories, namely educators and non-educators. Table 4.34 contains the summary of the responses to this question.

***Table 4.34:  Motivational sessions held for staff***

| Motivation of different staff categories | Free State Province | | Xhariep | | Motheo | | Lejweleputswa | | Thabo Mofutsanyana | | Northern Free State | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | f | % | f | % | f | % | f | % | f | % | f | % |
| **Educators** | (N = 280) | | (N =21) | | (N = 80) | | (N = 57) | | (N = 79) | | (N = 43) | |
| Yes | 242 | 86,4 | 18 | 85,7 | 66 | 82,5 | 47 | 82,5 | 71 | 89,9 | 40 | 93,0 |
| No | 38 | 13,6 | 3 | 14,3 | 14 | 17,5 | 10 | 17,5 | 8 | 10,1 | 3 | 7,0 |
| **Non-educators** | (N = 272) | | (N =21) | | (N = 76) | | (N = 56) | | (N = 77) | | (N = 42) | |
| Yes | 153 | 56,2 | 13 | 61,9 | 49 | 64,5 | 28 | 50,0 | 39 | 50,6 | 24 | 57,1 |
| No | 119 | 43,8 | 8 | 38,1 | 27 | 35,5 | 28 | 50,0 | 38 | 49,4 | 18 | 42,9 |

- **Motivational sessions held for educators**

Respondents in the Free State Province indicated via their responses that a high premium (86,4%) is placed on the presentation of motivational sessions for educators, with the highest rate of response coming from the Northern Free State Education District, namely 93,0%

- **Motivational sessions held for non-educators**

Most respondents in the Free State Province have motivational sessions for non-educators (56,2%), with the Motheo Education District being the education district where this takes place the most.

### 4.3.4.22  Frequency of motivational sessions held for staff

Question 34 aims at determining the frequency with which motivational sessions are held for staff. In this instance staff is again divided into two categories, namely educators and non-educators. Table 4.35 shows the frequency of motivational sessions for staff.

***Table 4.35:   Frequency of motivational sessions held for staff***

| Motivational sessions held for staff | Free State Province | | Xhariep | | Motheo | | Lejweleputswa | | Thabo Mofutsanyana | | Northern Free State | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | f | % | f | % | f | % | f | % | f | % | f | % |
| **Educators** | (N = 242) | | (N =18) | | (N = 66) | | (N = 47) | | (N = 71) | | (N = 40) | |
| Quarterly | 115 | 47,5 | 14 | 77,8 | 40 | 60,6 | 18 | 38,3 | 29 | 40,8 | 14 | 35,0 |
| Six monthly | 35 | 14,5 | 3 | 16,7 | 11 | 16,7 | 9 | 19,2 | 7 | 9,9 | 5 | 12,5 |
| Annually | 79 | 32,6 | 1 | 5,5 | 11 | 16,7 | 19 | 40,4 | 28 | 39,4 | 20 | 50,0 |
| Other | 13 | 5,4 | 0 | 0 | 4 | 6,0 | 1 | 2,0 | 7 | 9,9 | 1 | 2,5 |
| **Non-educators** | (N = 153) | | (N =13) | | (N = 49) | | (N = 28) | | (N = 39) | | (N = 24) | |
| Quarterly | 68 | 44,5 | 7 | 53,8 | 21 | 42,9 | 11 | 39,9 | 18 | 46,2 | 11 | 45,8 |
| Six monthly | 32 | 20,9 | 4 | 30,8 | 14 | 28,6 | 5 | 17,9 | 5 | 12,8 | 4 | 16,7 |
| Annually | 45 | 29,4 | 2 | 15,4 | 12 | 24,5 | 11 | 39,3 | 13 | 33,3 | 7 | 29,2 |
| Other | 8 | 5,2 | 0 | 0 | 2 | 4,0 | 1 | 3,5 | 3 | 7,7 | 2 | 8,3 |

- **Motivational sessions held for educators**

Most respondents in the Free State Province indicated that motivational sessions for educators are held on a quarterly basis, with the Xhariep Education District showing motivational sessions held quarterly in 77,8% of the cases. Annual motivational sessions also seem to be a popular option as indicated by respondents.

- **Motivational sessions held for non-educators**

Of the 56,3% of respondents in the Free State Province who did indicate motivational sessions for non-educators, the majority of respondents have shown the hosting of such sessions on a quarterly basis. The respondents in the Xhariep Education District indicated that this is the education district where motivational sessions are presented quarterly compared with most education districts.

### 4.3.4.23  Presenters of motivational sessions

Many options can be considered by the school principal in regard to the presentation of motivational sessions and by means of question 35 it can be determined who presides over the motivational sessions. Table 4.36 indicates the results of this question.

*Table 4.36:   Presenters of motivational sessions at schools*

| Education Districts | N | Frequency | | | | | Percentage | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | School principal | SMD | Staff member | Professional person | Other | School principal | SMD | Staff member | Professional person | Other |
| Xhariep | 18 | 17 | 7 | 5 | 5 | 0 | 94,4 | 38,9 | 27,8 | 27,8 | 0 |
| Motheo | 66 | 53 | 23 | 21 | 36 | 3 | 80,0 | 34,8 | 31,9 | 54,5 | 4,5 |
| Lejweleputswa | 47 | 37 | 15 | 14 | 29 | 1 | 78,7 | 31,9 | 29,8 | 61,7 | 2,1 |
| Thabo Mofutsanyana | 71 | 52 | 27 | 13 | 34 | 6 | 73,2 | 38,0 | 18,3 | 47,9 | 8,5 |
| Northern Free State | 40 | 26 | 19 | 4 | 22 | 0 | 65,0 | 47,5 | 10,0 | 55,0 | 0 |
| **Total:  Free State Province** | **242** | **185** | **91** | **57** | **126** | **10** | **76,4** | **37,6** | **23,6** | **52,1** | **4,1** |

The presentation of motivational sessions in schools in the Free State Province is done in most cases by the school principal, with the Xhariep Education District showing the most instances of the school principal personally handling the motivational sessions of staff in comparison with other education districts. Professional presentations are used very often as well in the Free State Province (52,1%), with the Lejweleputswa Education District where they are used the most (61,7%).

### 4.3.4.24  Knowledge of staff regarding grievance procedures

With question 36 it is endeavoured to determine if school principals in the Free State Province are of the opinion that their staff understand the process regarding grievance procedures. Table 4.37 indicates the spread of the results of this question.

***Table 4.37: Knowledge of staff based at schools regarding grievance procedures***

| Education Districts | N | Frequency | | | Percentage | | |
|---|---|---|---|---|---|---|---|
| | | Yes | No | Uncertain | Yes | No | Uncertain |
| Xhariep | 21 | 11 | 6 | 4 | 52,4 | 28,6 | 19,0 |
| Motheo | 80 | 56 | 5 | 19 | 70,0 | 6,2 | 23,8 |
| Lejweleputswa | 57 | 37 | 7 | 13 | 64,9 | 12,3 | 22,8 |
| Thabo Mofutsanyana | 79 | 51 | 9 | 19 | 64,6 | 11,3 | 24,1 |
| Northern Free State | 43 | 30 | 4 | 9 | 69,8 | 9,3 | 20,9 |
| **Total: Free State Province** | **280** | **185** | **31** | **64** | **66,1** | **11,1** | **22,8** |

Most of the respondents in the Free State Province are of the opinion that their various staff members are aware of the way in which the grievance procedures at their schools operate (66,1%), with the Motheo and Northern Free State Education Districts indicating, according to the views of the respondents, that their staff members are in possession of the necessary knowledge in regard to the functioning of grievance procedures.

Respondents in the Xhariep Education District indicated with the lowest response rate of 52,4% in terms of staff awareness regarding the functioning of the grievance process in their respective schools.

### 4.3.4.25  Handling of grievance procedures

The handling of grievance procedures may differ from school to school and this has a definite influence on the role of the school principal in the whole process. Question 37 aims at indicating who manages the grievance procedures in the school. Table 4.38 indicates the results obtained from this question.

**Table 4.38: Management of grievance procedures**

| Education Districts | N | Frequency School principal | SMT | Committee | SGB | Other | Percentage School principal | SMT | Committee | SGB | Other |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Xhariep | 21 | 15 | 6 | 1 | 2 | 1 | 17.4 | 28.6 | 4.8 | 9.5 | 4.8 |
| Motheo | 80 | 45 | 36 | 10 | 10 | 3 | 56,3 | 45,0 | 12,5 | 12,5 | 3,8 |
| Lejweleputswa | 57 | 34 | 27 | 5 | 10 | 2 | 59,6 | 47,4 | 8,8 | 17,5 | 3,5 |
| Thabo Mofutsanyana | 79 | 49 | 29 | 10 | 6 | 1 | 62,0 | 36,7 | 12,7 | 7,6 | 1,3 |
| Northern Free State | 43 | 21 | 19 | 6 | 1 | 1 | 48,8 | 44,2 | 14,0 | 2,3 | 2,3 |
| **Total:  Free State Province** | **280** | **164** | **117** | **32** | **29** | **8** | **58,6** | **41,8** | **11,4** | **10,4** | **2,9** |

From Table 4.38 it can be very clearly deduced that the school principal and SMT play a very big role in the management of the grievance procedures in schools.

### 4.3.4.26   Discipline of staff in performing their daily duties

The purpose of question 38 is aimed at determining the view of the school principal regarding the discipline of staff in the performance of their duties in various staff categories. Responses to this question are indicated in Table 4.39.

**Table 4.39:   Discipline of staff in performing their daily duties**

| Staff discipline | Free State Province | | Xhariep | | Motheo | | Lejweleputswa | | Thabo Mofutsanyana | | Northern Free State | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | f | % | f | % | f | % | f | % | f | % | f | % |
| **Educators** | (N = 280) | | (N =21) | | (N = 80) | | (N = 57) | | (N = 79) | | (N = 43) | |
| Yes | 254 | 90,7 | 19 | 90,5 | 74 | 92,5 | 55 | 96,5 | 70 | 88,6 | 36 | 83,7 |
| No | 26 | 9,3 | 2 | 9,5 | 6 | 7,5 | 2 | 3,5 | 9 | 11,4 | 7 | 16,3 |

| Admin staff | (N = 274) | | (N =21) | | (N = 75) | | (N = 56) | | (N = 79) | | (N = 43) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Yes | 261 | 95,3 | 19 | 90,5 | 71 | 94,7 | 55 | 98,2 | 75 | 94,9 | 41 | 95,3 |
| No | 13 | 4,7 | 2 | 9,5 | 4 | 5,3 | 1 | 1,8 | 4 | 5,1 | 2 | 4,7 |

| Terrain staff | (N = 226) | | (N =20) | | (N = 62) | | (N = 46) | | (N = 64) | | (N = 34) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Yes | 186 | 82,3 | 16 | 80,0 | 51 | 82,2 | 38 | 82,6 | 52 | 81,2 | 29 | 85,3 |
| No | 40 | 17,7 | 4 | 20,0 | 11 | 17,8 | 8 | 17,4 | 12 | 18,8 | 5 | 14,7 |

- **Discipline of educators in performing their daily duties**

Respondents in the Free State Province are of the opinion, indicated by a very high rate of response (90,7%), that they are satisfied with the discipline of educators at their schools. The highest level of satisfaction seems to be in the Lejweleputswa Education District (96,5%) and the respondents in the Northern Free State Education District seems the least satisfied with their educators in the performance of their daily duties.

- **Discipline of administrative staff in performing their daily duties**

In the Free State Province and all the education districts the respondents seem to be highly satisfied with the discipline of their administrative staff in the performance of their daily duties (95,3%), with the highest level of satisfaction of 98,2% indicated in the Lejweleputswa Education District.

- **Discipline of terrain staff in performing their daily duties**

The vast majority of respondents in the Free State Province (82,3%) indicated that they are satisfied with the discipline of their terrain staff in the completion of their daily duties. Respondents in the Northern Free State Education District seem the most satisfied.

### 4.3.4.27  School safety committee

The safety committee of a school's task is far bigger than the mere implementation of an emergency plan and includes the total spectrum of school safety. The purpose of question 39 is to ascertain if schools have a safety committee in place. Table 4.40 indicates the responses of question 39.

*Table 4.40:   Existence of a school safety committee*

| Education Districts | N | Frequency | | Percentage | |
|---|---|---|---|---|---|
| | | Yes | No | Yes | No |
| Xhariep | 21 | 6 | 15 | 28,6 | 71,4 |
| Motheo | 80 | 56 | 24 | 70,0 | 30,0 |
| Lejweleputswa | 57 | 53 | 4 | 93,0 | 7,0 |
| Thabo Mofutsanyana | 79 | 62 | 17 | 78,5 | 21,5 |
| Northern Free State | 43 | 34 | 9 | 79,1 | 20,9 |
| **Total:  Free State Province** | **280** | **211** | **69** | **75,4** | **24,6** |

The vast majority of respondents, namely 75,4%, in the Free State Province indicated that their schools have safety committees, with the Lejweleputswa Education District indicating nearly all schools having a safety committee in place at their schools (93,0%).

**4.3.4.28  Occupational Health and Safety Act, 85 of 1993**

Question 40 was asked to determine if conditions at the schools in the Free State Province comply with the Occupational Health and Safety Act, 85 of 1993. The compliance of schools in the Free State Province with the Act is indicated in Table 4.41.

*Table 4.41:    Compliance of schools with the Occupational Health and Safety Act, 85 of 1993*

| Education Districts | N | Frequency | | | Percentage | | |
|---|---|---|---|---|---|---|---|
| | | Do not know | Yes | No | Do not Know | Yes | No |
| Xhariep | 21 | 7 | 8 | 6 | 33,3 | 38,1 | 28,6 |
| Motheo | 80 | 36 | 36 | 8 | 45,0 | 45,0 | 10,0 |
| Lejweleputswa | 57 | 25 | 22 | 10 | 43,9 | 38,6 | 17,5 |
| Thabo Mofutsanyana | 79 | 24 | 44 | 11 | 30,4 | 55,7 | 13,9 |
| Northern Free State | 43 | 18 | 20 | 5 | 41,9 | 46,5 | 11,6 |
| **Total:  Free State Province** | **280** | **110** | **130** | **40** | **39,3** | **46,4** | **14,3** |

Although most respondents in the Free State Province feel that their schools comply with the requirements of the Occupational Health and Safety Act, 85 of 1993, respondents who are not sure or feel that their schools do not comply with these requirements are more than the group feeling that their schools do comply with the requirements of this Act. The Thabo Mofutsanyana Education District shows the most respondents indicating that their schools comply with the requirements of the Occupational Health and Safety Act, 85 of 1993 in comparison with other education districts also indicating that their schools comply with these requirements.

### 4.3.4.29  Inspections of terrain, tools and machinery (equipment)

The reason why question 41 was asked, was to determine if school principals in the Free State Province ensure that regular inspections are done of the terrain, tools and machinery (equipment), with Table 4.42 indicating the results of this question.

*Table 4.42:  Inspection of terrain, tools and machinery (equipment)*

| Education Districts | N | Frequency | | Percentage | |
|---|---|---|---|---|---|
| | | Yes | No | Yes | No |
| Xhariep | 21 | 8 | 13 | 38,1 | 61,9 |
| Motheo | 80 | 44 | 36 | 55,0 | 45,0 |
| Lejweleputswa | 57 | 39 | 18 | 68,4 | 31,6 |
| Thabo Mofutsanyana | 79 | 44 | 35 | 55,7 | 44,3 |
| Northern Free State | 43 | 21 | 22 | 48,8 | 51,2 |
| Total:  Free State Province | 280 | 156 | 124 | 55,7 | 44,3 |

Table 4.42 indicates that there were more respondents at schools in the Free State Province indicating that they do undertake regular inspections, with the Lejweleputswa Education District showing the highest rate of response in comparison with other education districts where regular inspections are undertaken, with respondents in the Xhariep Education District showing the lowest rate of response.

### 4.3.4.30  Written inspections and filing of reports

Question 42 aims at determining if school principals complete written reports of inspections and if those written reports are properly administered. These results are indicated in Table 4.43.

***Table 4.43:   Filing of written inspection reports***

| Education Districts | N | Frequency | | Percentage | |
|---|---|---|---|---|---|
| | | Yes | No | Yes | No |
| Xhariep | 21 | 4 | 17 | 19,0 | 81,0 |
| Motheo | 80 | 23 | 57 | 28,7 | 71,3 |
| Lejweleputswa | 57 | 8 | 49 | 14,0 | 86,0 |
| Thabo Mofutsanyana | 79 | 15 | 64 | 19,0 | 81,0 |
| Northern Free State | 43 | 10 | 33 | 23,3 | 76,7 |
| Total:  Free State Province | 280 | 60 | 220 | 21,4 | 78,6 |

The vast majority of respondents in the Free State Province are not in possession of written inspection reports that are filed for future reference. The Motheo Education District seems to be the education district complying with the undertaking of inspections and filing of written reports, with the Lejweleputswa Education District indicating this process taking place the least.

### 4.3.4.31  Availability of the Occupational Health and Safety Act, 85 of 1993

The purpose with question 43 is to ascertain if a copy of the Occupational Health and Safety Act, 85 of 1993 is available at schools in the Free State Province. The availability of the Occupational Health and Safety Act, 85 of 1993 at schools is indicated in Table 4.44.

*Table 4.44:  Availability at schools of the Occupational Health and Safety Act, 85 of 1993*

| Education Districts | N | Frequency | | | Percentage | | |
|---|---|---|---|---|---|---|---|
| | | Do not know | Yes | No | Do not know | Yes | No |
| Xhariep | 21 | 5 | 4 | 12 | 23,8 | 19,1 | 57,1 |
| Motheo | 80 | 11 | 28 | 41 | 13,8 | 35,0 | 51,2 |
| Lejweleputswa | 57 | 8 | 13 | 36 | 14,0 | 22,8 | 63,2 |
| Thabo Mofutsanyana | 79 | 14 | 22 | 43 | 17,7 | 27,9 | 54,4 |
| Northern Free State | 43 | 7 | 17 | 19 | 16,3 | 39,5 | 44,2 |
| **Total:  Free State Province** | **280** | **45** | **84** | **151** | **16,1** | **30,0** | **53,9** |

Very few respondents in the Free State Province indicated that they are in possession of a copy of the Occupational Health and Safety Act, 85 of 1993 with respondents in the Northern Free State Education District indicating, in comparison with the response of other education districts, that they are in possession of a copy of this Act.

**4.3.4.32  Personal files**

Question 44 was asked to ascertain if all staff members are in possession of a personal file at schools in the Free State Province. The responses to this question is indicated in Table 4.45.

*Table 4.45:  Personal files of staff*

| Personal files of staff | Free State Province | | Xhariep | | Motheo | | Lejweleputswa | | Thabo Mofutsanyana | | Northern Free State | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | f | % | f | % | f | % | f | % | f | % | f | % |
| **Educators** | (N = 280) | | (N =21) | | (N = 80) | | (N = 57) | | (N = 79) | | (N = 43) | |
| Yes | 275 | 98,2 | 21 | 100 | 78 | 97,5 | 57 | 100 | 77 | 97,5 | 42 | 97,7 |
| No | 5 | 1,8 | 0 | 0 | 2 | 2,5 | 0 | 0 | 2 | 2,5 | 1 | 1,8 |

| Non-educators | (N = 272) | | (N =21) | | (N = 76) | | (N = 56) | | (N = 77) | | (N = 42) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Yes | 246 | 90,4 | 20 | 95,2 | 68 | 89,5 | 51 | 91,1 | 72 | 93,5 | 35 | 83,3 |
| No | 26 | 9,6 | 1 | 4,8 | 8 | 10,5 | 5 | 8,9 | 5 | 6,5 | 7 | 16,7 |

Responses in Table 4.45 clearly indicates that nearly all educators and non-educators in the Free State Province have a personal file administered by the school.

### 4.3.4.33  Staff manual

The availability of a staff manual at schools in the Free State Province is investigated by question 45. Responses to this question are indicated in Table 4.46.

*Table 4.46:   Staff manuals at schools*

| Education Districts | N | Frequency | | Percentage | |
|---|---|---|---|---|---|
| | | Yes | No | Yes | No |
| Xhariep | 21 | 9 | 12 | 42,9 | 57,1 |
| Motheo | 80 | 53 | 27 | 66,2 | 33,8 |
| Lejweleputswa | 57 | 35 | 22 | 61,4 | 38,6 |
| Thabo Mofutsanyana | 79 | 40 | 39 | 50,6 | 49,4 |
| Northern Free State | 43 | 25 | 18 | 58,1 | 41,9 |
| **Total:  Free State Province** | **280** | **162** | **118** | **57,9** | **42,1** |

Only 57,9% of respondents in the Free State Province possess a staff manual that could be used as a source of reference, with the Motheo Education District, in comparison with other education districts, having the most respondents indicating that their schools are in possession of such a document.

### 4.3.4.34  Working conditions at schools

By means of question 46 school principals were asked to indicate if staff members are, in their opinion, satisfied with their working conditions at schools in the Free State Province. The spread of results is indicated in Table 4.47.

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*Table 4.47:  Satisfaction in regard to working conditions at schools*

| Education Districts | N | Frequency | | | Percentage | | |
|---|---|---|---|---|---|---|---|
| | | Yes | No | Uncertain | Yes | No | Uncertain |
| Xhariep | 21 | 13 | 5 | 3 | 61,9 | 23,8 | 14,3 |
| Motheo | 80 | 42 | 14 | 24 | 52,5 | 17,5 | 30,0 |
| Lejweleputswa | 57 | 36 | 9 | 12 | 63,2 | 15,8 | 21,0 |
| Thabo Mofutsanyana | 79 | 43 | 9 | 27 | 54,4 | 11,4 | 34,2 |
| Northern Free State | 43 | 30 | 3 | 10 | 69,8 | 7,0 | 23,3 |
| Total:  Free State Province | 280 | 164 | 40 | 76 | 58,6 | 14,3 | 27,1 |

The rate of response of respondents in Table 4.47 indicates that they are of the opinion that more staff members are satisfied with their working conditions at schools than those who are not satisfied with their working conditions. This opinion is the least expressed by respondents in the Motheo Education District.

### 4.3.4.35   Career satisfaction of staff

School principals must indicate by means of question 47 if they think that staff are satisfied in their careers. This question will be answered in two categories, namely educators and non-educators. The satisfaction of staff at schools with their careers are indicated by Table 4.48 according to a 5-point scale.

*Table 4.48:   Career satisfaction of staff*

| Career satisfaction of staff | Free State Province | | Xhariep | | Motheo | | Lejweleputswa | | Thabo Mofutsanyana | | Northern Free State | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | f | % | f | % | f | % | f | % | f | % | f | % |
| **Educators** | (N = 280) | | (N =21) | | (N = 80) | | (N = 57) | | (N = 79) | | (N = 43) | |
| Definitely Yes | 37 | 13,2 | 3 | 14,3 | 12 | 15,0 | 6 | 10,5 | 11 | 13,9 | 5 | 11,6 |
| Yes | 135 | 48,2 | 10 | 47,6 | 33 | 41,3 | 35 | 61,4 | 34 | 43,0 | 23 | 53,5 |
| Do not know | 71 | 25,0 | 5 | 23,8 | 25 | 31,2 | 11 | 19,3 | 22 | 27,9 | 7 | 16,3 |
| No | 32 | 11,4 | 3 | 14,3 | 10 | 12,5 | 3 | 5,3 | 9 | 11,4 | 7 | 16,3 |
| Definitely No | 6 | 2,1 | 0 | 0 | 0 | 0 | 2 | 3,5 | 3 | 3,8 | 1 | 2,3 |

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| Non-educators | (N = 272) | | (N =21) | | (N = 76) | | (N = 56) | | (N = 77) | | (N = 42) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Definitely Yes | 41 | 15,1 | 2 | 9,5 | 11 | 14,5 | 10 | 17,9 | 12 | 15,6 | 6 | 14,3 |
| Yes | 150 | 55,1 | 14 | 66,7 | 40 | 52,6 | 34 | 60,7 | 38 | 49,4 | 24 | 57,1 |
| Do not know | 68 | 25,0 | 3 | 14,3 | 24 | 31,6 | 9 | 16,0 | 21 | 27,3 | 11 | 26,2 |
| No | 10 | 3,7 | 2 | 9,5 | 1 | 1,3 | 2 | 3,6 | 4 | 5,1 | 1 | 2,4 |
| Definitely No | 3 | 1,1 | 0 | 0 | 0 | 0 | 1 | 1,8 | 2 | 2,6 | 0 | 0 |

- **Career satisfaction of educators**

According to respondents, more educators in the Free State Province seem to be satisfied with their career as educators than those who are not satisfied. The greatest measure of satisfaction seems to be in the Lejweleputswa Education District.

- **Career satisfaction of non-educators**

Respondents in the Free State Province seem to hold the opinion that non-educators are satisfied with their career, with the greatest level of satisfaction appearing in the Lejweleputswa Education District.

### 4.3.4.36  Staff satisfaction with Departmental salaries

By means of question 48 principals indicate their views regarding the satisfaction of educators and non-educators regarding their Departmental remuneration. The spread of the responses are shown by Table 4.49, using a 5-point scale.

*Table 4.49:   Staff satisfaction with Departmental salaries*

| Staff satisfaction with Departmental salaries | Free State Province | | Xhariep | | Motheo | | Lejweleputswa | | Thabo Mofutsanyana | | Northern Free State | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | f | % | f | % | f | % | f | % | f | % | f | % |
| **Educators** | (N = 280) | | (N =21) | | (N =57) | | (N = 57) | | (N = 79) | | (N = 43) | |
| Definitely Yes | 4 | 1,4 | 0 | 0 | 0 | 0 | 2 | 3,5 | 0 | 0 | 2 | 4,7 |
| Yes | 22 | 7,9 | 1 | 4,8 | 10 | 12,5 | 2 | 3,5 | 4 | 5,1 | 5 | 11,6 |
| Do not know | 61 | 21,8 | 7 | 33,3 | 12 | 15,0 | 11 | 19,3 | 23 | 29,1 | 8 | 18,6 |
| No | 127 | 45,4 | 10 | 47,6 | 41 | 51,2 | 25 | 43,9 | 35 | 44,3 | 16 | 37,2 |
| Definitely No | 66 | 23,6 | 3 | 14,3 | 17 | 21,3 | 17 | 29,8 | 17 | 21,5 | 12 | 27,9 |

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| Non-educators | (N = 272) | | (N =21) | | (N = 76) | | (N = 56) | | (N = 77) | | (N = 42) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Definitely Yes | 3 | 1,1 | 0 | 0 | 1 | 1,3 | 1 | 1,8 | 0 | 0 | 1 | 2,4 |
| Yes | 32 | 11,8 | 3 | 14,3 | 11 | 14,5 | 6 | 10,7 | 5 | 6,5 | 7 | 16,7 |
| Do not know | 80 | 29,4 | 7 | 33,3 | 17 | 22,4 | 16 | 28,6 | 29 | 37,7 | 11 | 26,2 |
| No | 110 | 40,4 | 11 | 52,4 | 34 | 44,7 | 19 | 33,9 | 32 | 41,5 | 14 | 33,3 |
| Definitely No | 47 | 17,3 | 0 | 0 | 13 | 17,1 | 14 | 25,0 | 11 | 14,3 | 9 | 21,4 |

- **Satisfaction of educators with their Departmental salaries**

The opinion is held by respondents in the Free State Province that educators at their schools are not satisfied with their departmental salaries, but the biggest instance of dissatisfaction is found in the Lejweleputswa Education District, with the Xhariep Education District seeming to be the least dissatisfied.

- **Satisfaction of non-educators with their Departmental salaries**

It is very clear that respondents in the Free State Province are of the opinion that non-educators are dissatisfied with their Departmental salaries, with the biggest dissatisfaction noted in the Motheo Education District, with the Thabo Mofutsanyana Education District seeming to be the least satisfied.

### 4.3.4.37  Salaries of school principals

Question 49 tries to determine whether school principals in the Free State Province are satisfied with their salaries. The results of this question is indicated in Table 4.50.

*Table 4.50:   Satisfaction of school principals with their salaries*

| Education Districts | N | Frequency | | | Percentage | | |
|---|---|---|---|---|---|---|---|
| | | Yes | Uncertain | No | Yes | Uncertain | No |
| Xhariep | 21 | 6 | 2 | 13 | 28,6 | 9,5 | 61,9 |
| Motheo | 80 | 11 | 8 | 61 | 13,8 | 10,0 | 76,2 |
| Lejweleputswa | 57 | 9 | 7 | 41 | 15,8 | 12,3 | 71,9 |
| Thabo Mofutsanyana | 79 | 14 | 8 | 57 | 17,7 | 10,1 | 72,2 |
| Northern Free State | 43 | 11 | 5 | 27 | 25,6 | 11,6 | 62,8 |
| **Total:  Free State Province** | **280** | **51** | **30** | **199** | **18,2** | **10,7** | **71,1** |

Table 4.50 very clearly indicates that respondents in the Free State Province in all education districts are not satisfied with their salaries, with the biggest dissatisfaction visible in the Motheo Education District.

### 4.3.4.38  Training of school principals in HRM

School principals are asked specifically in question 50 if they feel that they are sufficiently trained for their task as HR manager of their schools. The opinion of respondents regarding their training as HR managers is indicated by Table 4.51.

*Table 4.51:   Training of school principals in HRM*

| Education Districts | N | Frequency | | Percentage | |
|---|---|---|---|---|---|
| | | Yes | No | Yes | No |
| Xhariep | 21 | 6 | 15 | 28,6 | 71,4 |
| Motheo | 80 | 32 | 48 | 40,0 | 60,0 |
| Lejweleputswa | 57 | 20 | 37 | 35,1 | 64,9 |
| Thabo Mofutsanyana | 79 | 23 | 56 | 29,1 | 70,9 |
| Northern Free State | 43 | 22 | 21 | 51,2 | 48,8 |
| **Total:  Free State Province** | **280** | **103** | **177** | **36,8** | **63,2** |

Respondents in the Free State Province feel that they are not sufficiently trained for their HRM task. The results, according to Table 4.51, indicate that respondents in the Xhariep Education District revealed most clearly that they are insufficiently trained for their HRM task, with a small majority of respondents in the Northern Free State Province indicating that they are sufficiently trained for their HRM task.

### 4.3.4.39  HRM knowledge of SMD's

Question 51 was set to ascertain if school principals in the Free State Province feel that their school's SMD has sufficient knowledge to enable them to support the school principals in their HRM task. Table 4.52 contains a summary of the responses to this question.

**Table 4.52: HRM knowledge of SMD's**

| Education Districts | N | Frequency | | | Percentage | | |
|---|---|---|---|---|---|---|---|
| | | Yes | Uncertain | No | Yes | Uncertain | No |
| Xhariep | 21 | 14 | 7 | 0 | 66,7 | 33,3 | 0 |
| Motheo | 80 | 34 | 23 | 23 | 42,6 | 28,7 | 28,7 |
| Lejweleputswa | 57 | 20 | 25 | 12 | 35,1 | 43,9 | 21,0 |
| Thabo Mofutsanyana | 79 | 28 | 32 | 19 | 35,4 | 40,5 | 24,1 |
| Northern Free State | 43 | 27 | 8 | 8 | 62,8 | 18,6 | 18,6 |
| **Total: Free State Province** | **280** | **123** | **95** | **62** | **44,0** | **33,9** | **22,1** |

Although the majority of respondents in the Free State Province are of the opinion that their SMD's have sufficient knowledge to support them in their HRM task, a group indicated their uncertainty regarding the abilities of their SMD's and another group felt that the SMD's are not in possession of sufficient knowledge. Respondents in the Xhariep and Northern Free State Education District are satisfied with the knowledge of their SMD's regarding their HRM task, while other education districts' respondents are not totally satisfied.

**4.3.4.40   HRM assistance rendered by Education District Offices and the Departmental Head Office to school principals**

The reason for asking question 52 and 53 was to determine if Education District Offices and the Departmental Head Office are supplying sufficient support to school principals in terms of their HRM task at their schools.

The results of satisfactions with the HRM assistance by education districts and the Head Office of the Free State Department of Education are indicated in Table 4.53.

***Table 4.53:   HRM assistance rendered by Education District Offices and the Departmental Head Office***

| HRM assistance | Free State Province (N = 280) | | Xhariep (N = 21) | | Motheo (N = 80) | | Lejweleputswa (N = 57) | | Thabo Mofutsanyana (N = 79) | | Northern Free State (N = 43) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | f | % | f | % | f | % | f | % | f | % | f | % |
| **Education District offices (N = 280)** | | | | | | | | | | | | |
| Yes | 88 | 31,4 | 9 | 42,9 | 26 | 32,5 | 12 | 21,0 | 22 | 27,8 | 19 | 44,2 |
| Uncertain | 67 | 23,9 | 5 | 23,8 | 17 | 21,2 | 16 | 28,1 | 21 | 26,6 | 8 | 18,6 |
| No | 125 | 44,7 | 7 | 33,3 | 37 | 46,3 | 29 | 50,9 | 36 | 45,6 | 16 | 37,2 |
| **Departmental Head Office (N = 280)** | | | | | | | | | | | | |
| Yes | 73 | 26,1 | 7 | 33,3 | 22 | 27,5 | 20 | 35,1 | 20 | 25,3 | 13 | 30,2 |
| Uncertain | 82 | 29,3 | 7 | 33,3 | 20 | 25,0 | 25 | 43,9 | 24 | 30,4 | 15 | 34,9 |
| No | 125 | 44,6 | 7 | 33,3 | 39 | 47,5 | 12 | 21,0 | 35 | 44,3 | 15 | 34,9 |

- **HRM assistance to school principals by Education District Offices**

According to respondents the service rendered by Education District Offices to schools in the Free State Province is not up to standard. Respondents in the Xhariep and Northern Free State Education Districts seem the most satisfied with the HRM service provided by their education district offices, with the respondents in the Lejweleputswa Education District seeming to be the least satisfied with the HRM support rendered by their Education District Office.

- **HRM assistance to school principals by the Departmental Head Office**

Respondents in the Free State Province are clearly not at all satisfied with the assistance granted them by the Departmental Head Office in terms of their HRM task. However, a large number of respondents also indicated that they are uncertain or satisfied with the assistance by the Departmental Head Office. In comparison with other education districts, the respondents in the Lejweleputswa Education Department

seemed to be the least satisfied with the service rendered by the Departmental Head Office.

### 4.3.4.41  Responsibility for training and development

Question 56 aims at determining who, according to school principals in the Free State Province, are to be given the responsibility for their training and development. Table 4.54 gives a summary of responses regarding the acceptance of responsibility in the training and development of school principals.

*Table 4.54:   Responsibility for training and development of school*
*principals*

| Education Districts | N | Frequency | | | | | Percentage | | | | |
| | | School Principal | Education Department | Union | SGB | Other | School principal | Education Department | Union | SGB | Other |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Xhariep | 21 | 6 | 19 | 0 | 1 | 0 | 28,6 | 90,5 | 0 | 4,8 | 0 |
| Motheo | 80 | 12 | 73 | 10 | 3 | 4 | 15,0 | 91,3 | 12,5 | 3,8 | 5,3 |
| Lejweleputswa | 57 | 12 | 53 | 11 | 5 | 3 | 21,1 | 93,0 | 19,3 | 8,8 | 5,3 |
| Thabo Mofutsanyana | 79 | 18 | 74 | 8 | 4 | 1 | 22,8 | 93,7 | 10,1 | 5,1 | 1,3 |
| Northern Free State | 43 | 6 | 37 | 4 | 3 | 2 | 14,0 | 86,0 | 9,3 | 7,0 | 4,7 |
| **Total:  Free State Province** | **280** | **54** | **256** | **33** | **16** | **10** | **19,3** | **91,4** | **11,8** | **5,7** | **3,6** |

Table 4.54 indicates that the vast majority of school principals are of the opinion that the FSDoE should take responsibility for the training and development of school principals, but that the school principals themselves should also take co-responsibility and that unions and SGB's are also important role players in this regard.

### 4.3.4.42  Formal exit-interviews

Formal interviews are an important aspect that should be undertaken with all staff members leaving the school. By means of question 57 it is determined if school

principals conduct these interviews on a formal basis with educators and non-educators leaving the school. The results of this question is indicated in Table 4.55.

**Table 4.55:   Formal exit-interviews conducted with staff leaving schools**

| Formal exit-interviews | Free State Province | | Xhariep | | Motheo | | Lejweleputswa | | Thabo Mofutsanyana | | Northern Free State | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | f | % | f | % | f | % | f | % | f | % | f | % |
| **Educators** | (N = 280) | | (N =21) | | (N = 80) | | (N = 57) | | (N = 79) | | (N = 43) | |
| Yes | 113 | 40,4 | 8 | 38,1 | 34 | 42,5 | 24 | 42,1 | 28 | 35,4 | 19 | 44,2 |
| No | 167 | 59,6 | 13 | 61,9 | 46 | 57,5 | 33 | 57,9 | 51 | 64,6 | 24 | 55,8 |
| **Non-educators** | (N = 272) | | (N =21) | | (N = 76) | | (N = 56) | | (N = 77) | | (N = 42) | |
| Yes | 96 | 35,3 | 8 | 38,1 | 28 | 36,8 | 17 | 30,4 | 26 | 33,8 | 17 | 40,5 |
| No | 176 | 64,7 | 13 | 61,9 | 48 | 63,2 | 39 | 69,6 | 51 | 66,2 | 25 | 59,5 |

- **Formal exit-interviews conducted with educators**

The majority of respondents in the Free State Province do not conduct formal interviews with educators leaving the school. The rate of response in all education districts shows great similarities.

- **Exit-interviews conducted with non-educators**

Formal interviews with non-educators who are leaving the service of the school are not done in the majority of cases. The results are reasonably constant in all education districts.

## 4.3.5 Frequencies with regard to the Human Resources Management task of school principals in regard to SGB appointments

### 4.3.5.1 Categories of SGB staff appointments

Question 58 was asked to determine which categories of staff are representative of SGB appointments at schools. Table 4.56 indicates the spread of the results of this question.

*Table 4.56   Categories of SGB staff at schools*

| Education Districts | N | Frequency | | | | | | | Percentage | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Educators | Support staff | Admin staff | Terrain staff | Hostel staff | Pre-primary | Other | Educators | Support staff | Admin staff | Terrain staff | Hostel staff | Pre-primary | Other |
| Xhariep | 8 | 7 | 1 | 4 | 6 | 1 | 1 | 0 | 87,5 | 1,3 | 50,0 | 75,0 | 1,3 | 1,3 | 0 |
| Motheo | 31 | 28 | 5 | 25 | 24 | 5 | 10 | 3 | 90,3 | 16,1 | 80,6 | 77,4 | 16,1 | 32,3 | 9,7 |
| Lejweleputswa | 28 | 26 | 4 | 22 | 24 | 2 | 6 | 2 | 92,9 | 14,3 | 78,6 | 85,7 | 7,1 | 21,4 | 7,1 |
| Thabo Mofutsanyana | 25 | 22 | 0 | 16 | 18 | 6 | 4 | 2 | 84,6 | 0 | 61,5 | 69.2 | 23,1 | 15,4 | 7,7 |
| Northern Free State | 15 | 14 | 0 | 9 | 13 | 4 | 3 | 1 | 93,3 | 0 | 60,0 | 86,7 | 26,7 | 20,0 | 6,7 |
| **Total: Free State Province** | **108** | **97** | **10** | **76** | **85** | **18** | **24** | **8** | **89,8** | **9,3** | **70,4** | **78,7** | **16,7** | **22,2** | **7,4** |

From Table 4.56 it can be clearly seen that the SGB's in the Free State Province mainly appoint educators, administrative staff and terrain staff from school funds.

### 4.3.5.2 Performance appraisal for non-educators

Performance appraisal is done according to prescriptions supplied for Departmental appointments. Question 59 aims at ascertaining if performance appraisal is also implemented for non-educators remunerated by the SGB. The result of the responses can be seen in Table 4.57.

*Table 4.57:   Performance appraisal for non-educators employed by the SGB*

| Education Districts | N | Frequency | | Percentage | |
|---|---|---|---|---|---|
| | | Yes | No | Yes | No |
| Xhariep | 8 | 3 | 5 | 37,5 | 62,5 |
| Motheo | 31 | 10 | 21 | 32,3 | 67,7 |
| Lejweleputswa | 28 | 6 | 22 | 21,4 | 78,6 |
| Thabo Mofutsanyana | 25 | 4 | 21 | 16,0 | 84,0 |
| Northern Free State | 15 | 4 | 11 | 26,7 | 73,3 |
| **Total:  Free State Province** | **107** | **27** | **80** | **25,2** | **74,8** |

Respondents in the Free State Province who indicated that they have non-educators on staff who are remunerated by the SGB did not significantly indicate that performance appraisals are done for these employees. In the Thabo Mofutsanyana Education District performance appraisals are done in the least instances for this category of staff.

### 4.3.5.3  Developmental Appraisal for educators

Development appraisal is done on an annual basis for educators in Departmental posts and this is done according to Departmental prescriptions by school principals in the Free State Province. Question 60 aims at determining if school principals implement Development Appraisal for educators employed by the SGB. Table 4.58 indicates the results of this question.

*Table 4.58:   Developmental Appraisal for educators employed by the SGB*

| Education Districts | N | Frequency | | Percentage | |
|---|---|---|---|---|---|
| | | Yes | No | Yes | No |
| Xhariep | 7 | 3 | 4 | 42,9 | 57,1 |
| Motheo | 28 | 15 | 13 | 53,6 | 46,4 |
| Lejweleputswa | 26 | 12 | 14 | 46,2 | 53,8 |
| Thabo Mofutsanyana | 22 | 8 | 14 | 36,4 | 63,6 |
| Northern Free State | 14 | 6 | 8 | 42,9 | 57,1 |
| **Total:  Free State Province** | **97** | **44** | **53** | **45,4** | **54,6** |

Although more respondents indicated that they do not use DAS for SGB appointed educators, the difference is not great. Respondents in the Thabo Mofutsanyana Education District do the least Development Appraisal with educators appointed by the SGB in comparison with other education districts.

### 4.3.5.4  Contractual aspects of SGB appointments
Question 61 is asked to determine who handles the contractual aspects of SGB appointments. The spread of the results are indicated by Table 4.59.

*Table 4.59:  Contractual aspects of SGB appointments*

| Education Districts | N | Frequency | | | Percentage | | |
|---|---|---|---|---|---|---|---|
| | | School principal | Member of SGB | Other | School principal | Member of SGB | Other |
| Xhariep | 8 | 4 | 4 | 0 | 50,0 | 50,0 | 0 |
| Motheo | 31 | 21 | 9 | 1 | 67,7 | 29,1 | 3,2 |
| Lejweleputswa | 28 | 25 | 2 | 1 | 89,3 | 7,1 | 3,6 |
| Thabo Mofutsanyana | 26 | 15 | 11 | 0 | 57,7 | 42,3 | 0 |
| Northern Free State | 15 | 12 | 2 | 1 | 80,0 | 13,3 | 6,7 |
| **Total:  Free State Province** | **108** | **77** | **28** | **3** | **71,3** | **25,9** | **2,8** |

The vast majority of respondents in the Free State Province indicated that the school principal is personally in charge of the handling of the contractual aspects of the SGB appointments. In the Lejweleputswa Education District school principals in 89,3% of the cases personally handle the contractual aspects of SGB appointments, with half the respondents in the Xhariep Education District indicating that school principals personally handle this important aspect and the other half indicating that the SGB handle the contractual aspects of SGB appointments.

### 4.3.5.5  Job descriptions of SGB appointments
The purpose in asking question 62 was to ascertain if SGB appointments at schools in the Free State Province are in possession of job descriptions. Table 4.60 contains a summary of the results of question 62.

**Table 4.60:   Job descriptions of SGB appointments**

| Education Districts | N | Frequency | | Percentage | |
|---|---|---|---|---|---|
| | | Yes | No | Yes | No |
| Xhariep | 8 | 6 | 2 | 75,0 | 25,0 |
| Motheo | 31 | 27 | 4 | 87,1 | 12,9 |
| Lejweleputswa | 28 | 24 | 4 | 85,7 | 12,9 |
| Thabo Mofutsanyana | 26 | 17 | 9 | 65,4 | 34,6 |
| Northern Free State | 15 | 14 | 1 | 93,3 | 6,7 |
| **Total:  Free State Province** | **108** | **88** | **20** | **81,5** | **18,5** |

According to the respondents in the Free State Province it seems that the job descriptions of the majority of SGB appointments are in place.

### 4.3.5.6  Salaries of SGB appointments

The exclusive purpose of question 63 is to determine if SGB's in the Free State Province remunerate their SGB appointments in accordance with Departmental scales. Educators and non-educators are viewed separately. The results are tabled in Table 4.61.

**Table 4.61:   Salaries of SGB appointed staff in comparison to Departmental salaries**

| SGB salaries | Free State Province | | Xhariep | | Motheo | | Lejweleputswa | | Thabo Mofutsanyana | | Northern Free State | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | f | % | f | % | f | % | f | % | f | % | f | % |
| **Educators** | (N = 97) | | (N =7) | | (N = 28) | | (N = 26) | | (N = 22) | | (N = 14) | |
| Yes | 20 | 20,6 | 1 | 14,3 | 4 | 14,3 | 10 | 38,5 | 2 | 9,1 | 3 | 21,4 |
| No | 77 | 79,4 | 6 | 85,7 | 24 | 85,7 | 16 | 61,5 | 20 | 90,9 | 11 | 78,6 |

| Non-educators | (N = 107) | | (N =8) | | (N = 31) | | (N = 28) | | (N = 25) | | (N = 15) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Yes | 14 | 13,1 | 0 | 0 | 4 | 12,9 | 5 | 17,9 | 2 | 8,0 | 3 | 20,0 |
| No | 93 | 86,9 | 8 | 100 | 27 | 87,1 | 23 | 82,1 | 23 | 92,0 | 12 | 80,0 |

- **Salaries of SGB appointed educators**

According to Table 4.61 educators in the Free State Province who are employed by the SGB's are largely not remunerated according to Departmental scales. The situation varies slightly in the Lejweleputswa Education District where many more SGB appointed educators are remunerated according to Departmental scales than in other education districts.

- **Salaries of SGB appointed non-educators**

Very few non-educators in the Free State Province who are employed by SGB's are remunerated according to Departmental scales. The results are largely comparable in all education districts.

### 4.3.5.7 Benefits of SGB appointments

The aim of asking question 64 is to ascertain if SGB appointments in the Free State Province receive benefits comparable to the benefits received by their Departmental colleagues. The responses are summarized in Table 4.62.

*Table 4.62: Benefits received by SGB appointed staff*

| Benefits of SGB appointed staff | Free State Province | | Xhariep | | Motheo | | Lejweleputswa | | Thabo Mofutsanyana | | Northern Free State | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | f | % | f | % | f | % | f | % | f | % | f | % |
| **Educators** | (N = 97) | | (N =7) | | (N = 28) | | (N = 26) | | (N = 22) | | (N = 14) | |
| Yes | 12 | 12,4 | 1 | 14,3 | 3 | 10,7 | 4 | 15,4 | 2 | 9,1 | 2 | 14,3 |
| No | 85 | 87,6 | 6 | 85,7 | 25 | 89,3 | 22 | 84,6 | 20 | 90,9 | 12 | 85,7 |

| Non-educators | (N = 107) | | (N =8) | | (N = 31) | | (N = 28) | | (N = 25) | | (N = 15) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Yes | 9 | 8,4 | 0 | 0 | 2 | 6,5 | 3 | 10,7 | 2 | 8,0 | 2 | 13,3 |
| No | 98 | 91,6 | 8 | 100 | 29 | 93,5 | 25 | 89,3 | 23 | 92,0 | 13 | 86,7 |

- **Benefits received by SGB appointed educators**

Respondents in the Free State Province indicated that very few educators who are in the service of SGB's receive benefits that compare favourably with those received by their Departmental colleagues. The results in the different education districts are largely similar.

- **Benefits received by SGB appointed non-educators**

Table 4.62 very clearly indicate that non-educators in the service of SGB's in the Free State Province have nearly no benefits comparable to the benefits available to their Departmental colleagues. The results obtained in the various education districts are largely similar.

### 4.3.5.8  Turnover of SGB appointed staff

By means of question 65 it is endeavoured to ascertain if there is a large turnover of SGB appointments at schools. Table 4.63 indicates the results of this question.

*Table 4.63:   Turnover of SGB appointed staff*

| Turnover of SGB appointments | Free State Province | | Xhariep | | Motheo | | Lejweleputswa | | Thabo Mofutsanyana | | Northern Free State | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | f | % | f | % | f | % | f | % | f | % | f | % |
| **Educators** | (N = 97) | | (N =7) | | (N = 28) | | (N = 26) | | (N = 22) | | (N = 14) | |
| Yes | 23 | 23,7 | 1 | 14,3 | 7 | 25,0 | 8 | 30,8 | 3 | 13,6 | 4 | 28,6 |
| No | 74 | 76,3 | 6 | 85,7 | 21 | 75,0 | 18 | 69,2 | 19 | 86,4 | 10 | 71,4 |

| Non-educators | (N = 107) | | (N =8) | | (N = 31) | | (N = 28) | | (N = 25) | | (N = 15) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Yes | 24 | 22,4 | 1 | 12,5 | 7 | 22,6 | 8 | 28,6 | 4 | 16,0 | 4 | 26,7 |
| No | 83 | 77,6 | 7 | 87,5 | 24 | 77,4 | 20 | 71,4 | 21 | 84,0 | 11 | 73,3 |

- **Turnover of SGB appointed educators**

Table 4.63 indicates that there is not a large turnover over SGB appointed educators at schools in the Free State Province. The education district with the largest turnover of SGB appointed educators is the Lejweleputswa Education District, while the Thabo Mofutsanyana Education District showed the smallest turnover of SGB appointed educators.

- **Turnover of SGB appointed non-educators**

From Table 4.63 it can be clearly seen that the labour turnover in regard to non-educators employed by the SGB in the Free State Province is low. The highest labour turnover can be seen in the Lejweleputswa Education District in regard to non-educators employed by the SGB.

## 4.4  CONCLUSION

In this chapter the goals of the empirical research and the research progress and the compilation and handling of the questionnaire were described. The statistical results were then noted in frequency tables and represented in an orderly fashion.

The questions were divided into four sections, namely:

- Personal information of school principals
- Information on schools
- The HRM task of school principals
- The HRM task of school principals with regard to HRM appointments

These results will be used in Chapter 7 in regard to certain recommendations and conclusions. In the next chapter the interpretation of the research results will be continued.

# CHAPTER 5

# ANALYSIS AND INTERPRETATION OF RESEARCH RESULTS: TRAINING NEEDS AND IMPORTANCE OF HUMAN RESOURCES MANAGEMENT TASKS OF SCHOOL PRINCIPALS

## 5.1  INTRODUCTION

The aim of the analysis and interpretation of the research results is to determine the training needs of respondents with regard to HRM and the importance of HRM tasks. A secondary aim is to determine whether or not there is a relationship between the importance respondents place on aspects of HRM and their need for training in the specific aspects.

To achieve these aims, comparisons of training needs and the importance of HRM tasks will be drawn within the Free State Province as a whole and within each education district as well as within other sub-groups such as gender, age groups and groups according to qualifications and experience. Furthermore, the training needs as well as the importance of HRM tasks will be compared among different education districts and also among different sub-groups.

The analysis, comparison and interpretation are done according to the responses of respondents to questions 54 and 55 of the questionnaire (cf. Appendix C). Question 54 requires of respondents to indicate, on a 5 - point scale their need for training in nine HRM tasks. In response to question 55, respondents have to indicate the importance of the same nine HRM tasks, again using a 5 - point scale. The mean for various combinations or raw data was calculated and forms the basis for the computation of data. Furthermore, the t-test for correlated means was used to determine the statistical significance of differences between mean scores.

## 5.2 TRAINING NEEDS AND THE IMPORTANCE OF HRM TASKS: COMPARISON WITHIN THE FREE STATE PROVINCE AND EDUCATION DISTRICTS

### 5.2.1 Free State Province

Table 5.1 shows the comparison of training needs and the importance of HRM tasks of school principals within the Free State Province as a whole. The mean of all the listed training needs of respondents in the Free State Province is 3,6627 on the 5-point scale. This indicates that respondents in the Free State do indeed express a need for training in Human Resources Management, as the overall mean score is greater than 3. The respondents also consider all of the HRM aspects very important, because the overall mean for this is 4,5052.

Table 5.1 shows that respondents view only training in shortlisting and interviews as no training needed, since the mean in this case is below 3. All of the respondents perceive the importance of the different aspects covered in question 55 as integral parts of their management functions, since the mean scores for each individual aspect is greater than 4 for the evaluation of importance. Effective motivational techniques are identified as both the most pressing training need and the most important HRM function that school principals can perform. Health and safety management, training with regard to DAS for educators and the training and development of staff also emerge as highly ranked training needs, with the training and development of staff, disciplinary aspects and shortlisting and interviews emerging as the HRM functions considered of great importance, although training and development of staff are not viewed as the highest of priorities for the two latter tasks.

The differences of the mean scores between training needs and the importance of HRM tasks of school principals are statistically significant overall and for each of the listed HRM tasks.

### 5.2.2 Xhariep Education District

Table 5.2 shows the comparison of training needs and the importance of HRM tasks of school principals within the Xhariep Education District. Responses from the Xhariep

**Table 5.1: Training needs and the importance of the HRM tasks for the target population**

| HRM tasks of school principals | Training needs (N = 280) | | Importance (N = 280) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| 1. Shortlisting and interviews | 2,7143 | 9 | 4,5429 | 4 | -1,8286 | 0,000 * |
| 2. Career planning of staff | 3,8143 | 5 | 4,3893 | 8 | -0,5750 | 0,000 * |
| 3. Training and development of staff | 3,8429 | 4 | 4,6393 | 2 | -0,7964 | 0,000 * |
| 4. Disciplinary aspects | 3,4571 | 8 | 4,6107 | 3 | -1,1536 | 0,000 * |
| 5. Health and safety management | 3,8607 | 2 | 4,4464 | 6 | -0,5857 | 0,000 * |
| 6. PA for non-educators | 3,7536 | 7 | 4,3750 | 9 | -0,5214 | 0,000 * |
| 7. DAS for educators | 3,8500 | 3 | 4,3929 | 7 | -0,5429 | 0,000 * |
| 8. HR Administration | 3,7607 | 6 | 4,4964 | 5 | -0,7357 | 0,000 * |
| 9. Motivational techniques | 3,9107 | 1 | 4,6536 | 1 | -0,7429 | 0,000 * |
| **Overall** | **3,6627** | | **4,5052** | | **-0,8425** | **0,000 *** |

* The difference is statistically significant if P<0,05.

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**Table 5.2: Training needs and the importance of HRM tasks of school principals in the Xhariep Education District**

| HRM tasks of school principals | Training needs (N = 21) | | Importance (N = 21) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,8571 | 9 | 4,7619 | 2 | -1,9048 | 0,000 * |
| | | | | | | |
| 2. Career planning of staff | 3,8095 | 3 | 4,2381 | 9 | -0,4286 | 0,176 |
| | | | | | | |
| 3. Training and development of staff | 3,8095 | 3 | 4,7619 | 2 | -0,9524 | 0,001 * |
| | | | | | | |
| 4. Disciplinary aspects | 3,0476 | 8 | 4,8095 | 1 | -1,7619 | 0,000 * |
| | | | | | | |
| 5. Health and safety management | 3,9048 | 2 | 4,4286 | 6 | -0,5238 | 0,008 * |
| | | | | | | |
| 6. PA for non-educators | 3,5238 | 7 | 4,4286 | 6 | -0,9048 | 0,001 * |
| | | | | | | |
| 7. DAS for educators | 3,6667 | 6 | 4,4286 | 6 | -0,7619 | 0,004 * |
| | | | | | | |
| 8. HR Administration | 3,9524 | 1 | 4,6190 | 5 | -0,6667 | 0,005 * |
| | | | | | | |
| 9. Motivational techniques | 3,8095 | 3 | 4,6667 | 4 | -0,8571 | 0,016 * |
| | | | | | | |
| **Overall** | **3,5979** | | **4,5714** | | **-0,9735** | **0,000 *** |

\* The difference is statistically significant if P<0,05.

Education District indicate a definite need for training (overall mean > 3), with the overall mean score for the importance of HRM tasks once again greater than 4, which indicates a high level of importance.

In the Xhariep Education District only one aspect requires no training (mean < 3), namely shortlisting and interviews, with the respondents ranking HR administration, health and safety management and the training and development of staff the greatest training priorities. Disciplinary aspects, shortlisting and interviews and the training and development of staff were highly ranked HRM tasks, with the career planning of staff emerging as the least important HRM task, although the function's mean score remains very high.

The difference in mean scores of training needs and importance of HRM tasks overall is statistically significant, as well as for each of HRM tasks, except in the case of career planning of staff where the difference is not statistically significant.

### 5.2.3  Motheo Education District

In Table 5.3 a comparison is drawn between the training needs and the importance of HRM tasks of school principals in the Motheo Education District. An overall mean score (mean = 3,7014) expressing a need for training in the Motheo Education District (mean > 3), with respondents putting great value on all HRM tasks (mean = 4,4667).

The respondents in the Motheo Education District also express a definite need for training in all aspects contained in question 54, except for training in shortlisting and interviews, which is not considered a training need, since it exhibits a mean score of less than 3. DAS for educators, motivational techniques and career planning of staff are seen as the most important training needs.

Once again, all aspects of HRM are considered very important. Motivational techniques and training and development of staff are seen as the most important HRM tasks, with PA for non-educators considered of lesser importance. Overall and individually, the differences between the mean scores of training needs and the importance of HRM tasks are statistically significant for each of the listed HRM tasks.

**Table 5.3:** **Training needs and the importance of HRM tasks of school principals in the Motheo Education District**

| HRM tasks of school principals | Training needs (N = 80) | | Importance (N = 80) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,8000 | 9 | 4,4875 | 4 | -1,6875 | 0,000 * |
| | | | | | | |
| 2. Career planning of staff | 3,8750 | 3 | 4,3500 | 8 | -0,4750 | 0,001 * |
| | | | | | | |
| 3. Training and development of staff | 3,8625 | 4 | 4,6000 | 1 | -0,7375 | 0,000 * |
| | | | | | | |
| 4. Disciplinary aspects | 3,5625 | 8 | 4,5375 | 3 | -0,9750 | 0,000 * |
| | | | | | | |
| 5. Health and safety management | 3,8125 | 5 | 4,4000 | 7 | -0,5875 | 0,000 * |
| | | | | | | |
| 6. PA for non-educators | 3,7000 | 7 | 4,3375 | 9 | -0,6375 | 0,000 * |
| | | | | | | |
| 7. DAS for educators | 4,0125 | 1 | 4,4375 | 6 | -0,4250 | 0,002 * |
| | | | | | | |
| 8. HR Administration | 3,7875 | 6 | 4,4500 | 5 | -0,6625 | 0,000 * |
| | | | | | | |
| 9. Motivational techniques | 3,9000 | 2 | 4,6000 | 1 | -0,7000 | 0,000 * |
| | | | | | | |
| **Overall** | **3,7014** | | **4,4667** | | **-0,7653** | **0,000 *** |

* The difference is statistically significant if P<0,05.

### 5.2.4  Lejweleputswa Education District

Table 5.4 shows a comparison of training needs and the importance of HRM tasks of school principals in the Lejweleputswa Education District. The mean score regarding training needs in this education district indicates a definite need (mean = 3,5887), while a premium is placed on the value of the HRM task on the whole, with its high mean score of 4,4581.

As regards training needs, Lejweleputswa's respondents' greatest demand is for training in motivational techniques, with DAS for educators and health and safety management also given high priority for training.  Once again, shortlisting and interviews is the aspect where no training is desired (mean < 3).

Motivational techniques are again seen as the most crucial of HRM tasks for the school principal, with training and development of staff and disciplinary aspects close behind.  Once again, career planning of staff is ranked last, with DAS for educators and PA for non-educators ranked 8 and 7 respectively.

The overall difference of the mean scores for training needs and the importance of HRM tasks of school principals, as well as the differences of the mean scores between the listed HRM tasks are statistically significant.

### 5.2.5  Thabo Mofutsanyana Education District

Table 5.5 shows the comparison of training needs and HRM tasks of school principals in the Thabo Mofutsanyana Education District. In this education district both training needs (overall mean = 3,8172) and the importance of the HRM task (overall mean = 4,6020) show positive mean scores higher than 3, with each of the HRM tasks again (mean > 3) seen as highly important for day-to-day functioning as a school principal (mean score = 4,6020).

Respondents in the Thabo Mofutsanyana Education District regard motivational techniques as the most relevant training need, with career planning of staff and training and development of staff emerging as areas where a definite training need exists.  Once again, shortlisting and interviews comes up as the HRM task where no training is needed (mean < 3).

**Table 5.4:** **Training needs and the importance of HRM tasks of school principals in the Lejweleputswa Education District**

| HRM tasks of school principals | Training needs (N = 57) | | Importance (N = 57) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,6667 | 9 | 4,5088 | 5 | -1,8421 | 0,000 * |
| | | | | | | |
| 2. Career planning of staff | 3,6140 | 7 | 4,2105 | 9 | -0,5965 | 0,003 * |
| | | | | | | |
| 3. Training and development of staff | 3,7193 | 6 | 4,6491 | 2 | -0,9298 | 0,000 * |
| | | | | | | |
| 4. Disciplinary aspects | 3,3158 | 8 | 4,5965 | 3 | -1,2807 | 0,000 * |
| | | | | | | |
| 5. Health and safety management | 3,8070 | 2 | 4,4035 | 6 | -0,5965 | 0,002 * |
| | | | | | | |
| 6. PA for non-educators | 3,7368 | 5 | 4,3158 | 7 | -0,5789 | 0,002 * |
| | | | | | | |
| 7. DAS for educators | 3,8070 | 2 | 4,2281 | 8 | -0,4211 | 0,009 * |
| | | | | | | |
| 8. HR Administration | 3,7544 | 4 | 4,5263 | 4 | -0,7719 | 0,000 * |
| | | | | | | |
| 9. Motivational techniques | 3,8772 | 1 | 4,6842 | 1 | -0,8070 | 0,000 * |
| | | | | | | |
| **Overall** | **3,5887** | | **4,4581** | | **-0,8694** | **0,000 *** |

* The difference is statistically significant if P<0,05.

**Table 5.5: Training needs and the importance of HRM tasks of school principals in the Thabo Mofutsanyana Education District**

| HRM tasks of school principals | Training needs (N = 79) | | Importance (N = 79) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| 1. Shortlisting and interviews | 2,8987 | 9 | 4,5570 | 6 | -1,6582 | 0,000 * |
| 2. Career planning of staff | 4,0253 | 2 | 4,5823 | 4 | -0,5570 | 0,000 * |
| 3. Training and development of staff | 4,0127 | 3 | 4,6835 | 2 | -0,6709 | 0,000 * |
| 4. Disciplinary aspects | 3,6203 | 8 | 4,6456 | 3 | -1,0253 | 0,000 * |
| 5. Health and safety management | 3,9620 | 4 | 4,5443 | 7 | -0,5823 | 0,000 * |
| 6. PA for non-educators | 3,9367 | 6 | 4,5190 | 9 | -0,5823 | 0,001 * |
| 7. DAS for educators | 3,9620 | 4 | 4,5443 | 7 | -0,5823 | 0,000 * |
| 8. HR Administration | 3,8734 | 7 | 4,5696 | 5 | -0,6962 | 0,000 * |
| 9. Motivational techniques | 4,0633 | 1 | 4,7722 | 1 | -0,7089 | 0,000 * |
| **Overall** | **3,8172** | | **4,6020** | | **-0,7848** | **0,000 *** |

* The difference is statistically significant if P<0,05.

The respondents from this education district also perceive motivational techniques as the most important HRM task, together with training and development of staff and disciplinary aspects. Once more, PA for non-educators is seen as the least important HRM task.

In these results, both the difference between the overall mean scores and individual mean scores differences between training needs and the importance of HRM tasks of school principals are statistically significant.

## 5.2.6   Northern Free State Education District

Table 5.6 shows the comparison of training needs and HRM tasks of school principals in the Northern Free State Education District. The results in Table 5.6 show that respondents in the Northern Free State Education District have an overall need for training (mean > 3).  Once again, the overall importance placed on the school principal's HRM tasks is very high (mean =  4,4289).

The table repeats the trend thus far, with all tasks, other than shortlisting and interviews (mean < 3), showing a need for training (mean > 3), with the highest ranked training needs being health and safety management, motivational techniques and training and development of staff.

Apart from the shortlisting and interviews, discipline aspects, HR administration and DAS for educators shows to require the least training.

The trend for considering all HRM tasks highly important continues (overall mean = 4,4289), with the greatest emphasis on disciplinary aspects, training and development of staff and shortlisting and interviews, with PA for non-educators, DAS for educators and HR administration  being ranked marginally lowest.

The overall difference between the mean scores for training needs and HRM tasks of school principals and the differences of mean scores with regard to the listed HRM tasks are statistically significant.

**Table 5.6: Training needs and the importance of HRM tasks of school principals in the Northern Free State Education District**

| HRM tasks of school principals | Training needs (N = 43) | | Importance (N = 43) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,2093 | 9 | 4,5531 | 3 | -2,3438 | 0,000 * |
| | | | | | | |
| 2. Career planning of staff | 3,5814 | 5 | 4,4186 | 5 | -0,8372 | 0,000 * |
| | | | | | | |
| 3. Training and development of staff | 3,6744 | 3 | 4,5581 | 2 | -0,8837 | 0,000 * |
| | | | | | | |
| 4. Disciplinary aspects | 3,3488 | 8 | 4,6047 | 1 | -1,2558 | 0,000 * |
| | | | | | | |
| 5. Health and safety management | 3,8140 | 1 | 4,4186 | 5 | -0,6047 | 0,002 * |
| | | | | | | |
| 6. PA for non-educators | 3,6512 | 4 | 4,2326 | 8 | -0,5814 | 0,010 * |
| | | | | | | |
| 7. DAS for educators | 3,4884 | 6 | 4,2326 | 8 | -0,7442 | 0,002 * |
| | | | | | | |
| 8. HR Administration | 3,4186 | 7 | 4,3488 | 7 | -0,9302 | 0,000 * |
| | | | | | | |
| 9. Motivational techniques | 3,7442 | 2 | 4,4884 | 4 | -0,7442 | 0,000 * |
| | | | | | | |
| **Overall** | **3,4367** | | **4,4289** | | **-0,9922** | **0,000 *** |

# 5.3 TRAINING NEEDS AND IMPORTANCE OF HRM TASKS: COMPARISON WITHIN SUB-GROUPS OF RESPONDENTS

## 5.3.1 Gender

### 5.3.1.1 Male respondents in the Free State Province

Table 5.7 shows the comparison of training needs and the importance of HRM tasks of male school principals in the Free State Province. Results limited to male respondents indicate that the training needs on the overall mean score remain above 3 (mean = 3,6192) while the overall importance placed on HRM tasks in general indicates a very high mean score (mean = 4,5005).

Male respondents consider motivational techniques the priority training need, with health and safety management and the training and development of staff also highly ranked. No departure from the trend of no training requirements for shortlisting and interviews is encountered among male respondents, since this function's mean score remains below 3. Male respondents view all HRM tasks as important (mean > 3) with motivational techniques as their most important HRM task, with training and development of staff and disciplinary aspects close behind. Males perceive career planning of staff as a marginally less significant management function, together with PA for non-educators and DAS for educators. According to the males, training is needed in all aspects (mean > 3) except for shortlisting and interviews. The overall difference in mean scores when comparing training tasks and the importance of HRM tasks of school principals and mean scores of the listed HRM tasks with regard to male respondents are statistically significant.

### 5.3.1.2 Female respondents in the Free State Province

Table 5.8 shows the comparison of training needs and the importance of HRM tasks of school principals with regard to female respondents in the Free State Province. The overall mean score for female respondents indicates that there is a general need for training in all aspects (mean = 3,8841) with the only difference being that shortlisting and interviews has a

**Table 5.7:  Training needs and the importance of HRM tasks of male school principals in the Free State Province**

| HRM tasks of school principals | Training needs (N = 234) | | Importance (N = 234) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1.  Shortlisting and interviews | 2,6581 | 9 | 4,5385 | 4 | -1,8803 | 0,000 * |
| | | | | | | |
| 2.  Career planning of staff | 3,7692 | 5 | 4,3547 | 9 | -0,5855 | 0,000 * |
| | | | | | | |
| 3.  Training and development of staff | 3,8077 | 3 | 4,6325 | 2 | -0,8248 | 0,000 * |
| | | | | | | |
| 4.  Disciplinary aspects | 3,4145 | 8 | 4,6154 | 3 | -1,2009 | 0,000 * |
| | | | | | | |
| 5.  Health and safety management | 3,8333 | 2 | 4,4530 | 6 | -0,6197 | 0,000 * |
| | | | | | | |
| 6.  PA for non-educators | 3,7179 | 6 | 4,3889 | 8 | -0,6709 | 0,000 * |
| | | | | | | |
| 7.  DAS for educators | 3,8034 | 4 | 4,4060 | 7 | -0,6026 | 0,000 * |
| | | | | | | |
| 8.  HR Administration | 3,7179 | 6 | 4,4658 | 5 | -0,7479 | 0,000 * |
| | | | | | | |
| 9.  Motivational techniques | 3,8504 | 1 | 4,6496 | 1 | -0,7991 | 0,000 * |
| | | | | | | |
| **Overall** | **3,6192** | | **4,5005** | | **-0,8813** | **0,000 *** |

* The difference is statistically significant if P<0,05.

**Table 5.8:** **Training needs and the importance of HRM tasks of female school principals in the Free State Province**

| HRM tasks of school principals | Training needs (N = 46) | | Importance (N = 46) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 3,0000 | 9 | 4,5652 | 5 | -1,5652 | 0,000 * |
| | | | | | | |
| 2. Career planning of staff | 4,0435 | 3 | 4,5652 | 5 | -0,5217 | 0,003 * |
| | | | | | | |
| 3. Training and development of staff | 4,0217 | 4 | 4,6739 | 1 | -0,6522 | 0,000 * |
| | | | | | | |
| 4. Disciplinary aspects | 3,6739 | 8 | 4,5870 | 4 | -0,9130 | 0,000 * |
| | | | | | | |
| 5. Health and safety management | 4,0000 | 5 | 4,4130 | 7 | -0,4130 | 0,012 * |
| | | | | | | |
| 6. PA for non-educators | 3,9348 | 7 | 4,3043 | 9 | -0,3696 | 0,028 * |
| | | | | | | |
| 7. DAS for educators | 4,0870 | 2 | 4,3261 | 8 | -0,2391 | 0,117 |
| | | | | | | |
| 8. HR Administration | 3,9783 | 6 | 4,6522 | 3 | -0,6739 | 0,000 * |
| | | | | | | |
| 9. Motivational techniques | 4,2174 | 1 | 4,6739 | 1 | -0,4565 | 0,002 * |
| | | | | | | |
| **Overall** | **3,8841** | | **4,5290** | | **-0,6449** | **0,000 *** |

* The difference is statistically significant if P<0,05.

neutral mean (mean = 3). All the HRM tasks are seen as very important by female respondents (mean = 4,5290).

As in the overall trend, females see motivational techniques as both their most pressing training need and their most important HRM function as school principal. The training and development of staff and HR administration are ranked marginally second and third.

The least important task is seen to be PA for non-educators, followed by DAS for educators and health and safety management.

The overall difference in the mean scores when comparing training needs and the importance of HRM tasks of school principals and the individually listed HRM tasks with reference to female respondents in the Free State Province are statistically significant.

## 5.3.2  Age

### 5.3.2.1  Respondents 40 years and younger

The responses indicated in Table 5.9 shows a comparison of training needs and the importance of HRM tasks of school principals 40 years and younger in the Free State Province. Overall, respondents 40 years and younger do indicate a need for training in HRM tasks (mean > 3).  Similar to other groupings reviewed thus far, the importance placed on HRM as a whole is also very high, with an overall mean score of 4,5932.

Shortlisting and interviews continue the trend of respondents indicating no need for training (mean < 3), while training in disciplinary aspects and PA for non-educators was also less desired than in other areas of HRM in this category of respondents.

Motivational techniques are, once more, ranked very highly in both the need for training and the importance assigned to the task and its function, with only the training and development of staff being seen as slightly more important in this group of respondents.  Disciplinary aspects again arose with a strong rank order of 3.

**Table 5.9: Training needs and the importance of HRM tasks of school principals in the Free State Province according to respondents 40 years and younger**

| HRM tasks of school principals | Training needs (N = 59) | | Importance (N = 59) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,4746 | 9 | 4,4915 | 9 | -2,0169 | 0,000 * |
| | | | | | | |
| 2. Career planning of staff | 3,7119 | 4 | 4,5085 | 8 | -0,7966 | 0,000 * |
| | | | | | | |
| 3. Training and development of staff | 3,7288 | 2 | 4,7288 | 1 | -1,0000 | 0,000 * |
| | | | | | | |
| 4. Disciplinary aspects | 3,2034 | 8 | 4,6780 | 3 | -1,4746 | 0,000 * |
| | | | | | | |
| 5. Health and safety management | 3,6949 | 6 | 4,5763 | 5 | -0,8814 | 0,000 * |
| | | | | | | |
| 6. PA for non-educators | 3,6780 | 7 | 4,5424 | 6 | -0,8644 | 0,000 * |
| | | | | | | |
| 7. DAS for educators | 3,7288 | 2 | 4,5254 | 7 | -0,7966 | 0,000 * |
| | | | | | | |
| 8. HR Administration | 3,7119 | 4 | 4,5932 | 4 | -0,8814 | 0,000 * |
| | | | | | | |
| 9. Motivational techniques | 3,8983 | 1 | 4,6949 | 2 | -0,7966 | 0,000 * |
| | | | | | | |
| **Overall** | **3,5367** | | **4,5932** | | **-1,0565** | **0,000 *** |

* The difference is statistically significant if P<0,05.

Apart from shortlisting and interviews, this group of school principals also identified career planning of staff and DAS for educators as slightly less primary functions of HRM.

The overall difference in the mean scores with reference to training needs and the importance of HRM tasks of school principals and the differences in mean scores with regard to the listed HRM tasks are statistically significant.

### 5.3.2.2 Respondents older than 40 years

In Table 5.10 a comparison is drawn between the training needs and the importance of HRM tasks of school principals older than 40 years in the Free State Province. Among the school principals in the Free State Province older than 40 years there is also a definite need for training as expressed by the 3,6963 overall mean score. This sub-group places great value on HRM and its functions as the mean score is very high at 4,4816.

As far as training is concerned, respondents older than 40 years also see no need for training in shortlisting and training (mean < 3), while there is also less emphasis on training in disciplinary aspects, HR administration and PA for non-educators. Motivational techniques are considered the first priority for training among this sub-group of school principals, while they also gave preference to training in health and safety management and DAS for educators.

Of all the highly regarded HRM functions, motivational techniques are again on top, with development of staff and disciplinary aspects also highly ranked. PA for non-educators, career planning of staff and DAS for educators are seen to be of fractionally less value.

The overall difference in the mean scores with reference to training needs and the importance of HRM tasks of school principals and the differences in mean scores with regard to the listed HRM tasks are statistically significant.

**Table 5.10: Training needs and the importance of HRM tasks of school principals in the Free State Province according to respondents older than 40 years**

| HRM tasks of school principals | Training needs (N = 221) | | Importance (N = 221) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,7783 | 9 | 4,5566 | 4 | -1,7783 | 0,000 * |
| | | | | | | |
| 2. Career planning of staff | 3,8416 | 5 | 4,3575 | 7 | -0,5158 | 0,000 * |
| | | | | | | |
| 3. Training and development of staff | 3,8733 | 4 | 4,6154 | 2 | -0,7421 | 0,000 * |
| | | | | | | |
| 4. Disciplinary aspects | 3,5249 | 8 | 4,5928 | 3 | -1,0679 | 0,000 * |
| | | | | | | |
| 5. Health and safety management | 3,9050 | 2 | 4,4118 | 6 | -0,5068 | 0,000 * |
| | | | | | | |
| 6. PA for non-educators | 3,7738 | 6 | 4,3303 | 9 | -0,5566 | 0,000 * |
| | | | | | | |
| 7. DAS for educators | 3,8824 | 3 | 4,3575 | 7 | -0,4751 | 0,000 * |
| | | | | | | |
| 8. HR Administration | 3,7738 | 6 | 4,4706 | 5 | -0,6968 | 0,000 * |
| | | | | | | |
| 9. Motivational techniques | 3,9140 | 1 | 4,6425 | 1 | -0,7285 | 0,000 * |
| | | | | | | |
| **Overall** | **3,6963** | | **4,4816** | | **-0,7853** | **0,000 *** |

\* The difference is statistically significant if P<0,05.

### 5.3.3 Qualifications

**5.3.3.1 Respondents without a B.Ed. (Honours) qualification**

Table 5.11 shows the comparison between training needs and the importance of HRM tasks of school principals with reference to respondents without a B.Ed. (Honours) qualification. Respondents without a B.Ed. (Honours) degree show a list of scores similar to many of the other groups. Again, there is evidence of a training need in HRM among these respondents (mean > 3), while the mean for the importance of HRM overall is very high, (mean = 4,4717).

These respondents identify motivational techniques as the function most in need of training, together with DAS for educators and health and safety management. A training need for all aspects of HRM can be observed (mean > 3), except for the by now completely inevitable shortlisting and interviews, where no training is required (mean <3).

Motivational techniques was again the most important task, followed by training and development of staff and shortlisting and interviews. The less important tasks were DAS for educators followed by PA for non-educators and health and safety management.

The overall difference of the mean scores of training needs and the importance of HRM tasks of school principals and the differences in mean scores with regard to the listed HRM tasks are statistically significant.

**5.3.3.2 Respondents with a B.Ed. (Honours) qualification**

Table 5.12 shows the comparison between training needs and the importance of HRM tasks of school principals with reference to respondents with a B.Ed. (Honours) qualification. Respondents with a B.Ed. (Honours) qualification show an overall training need (mean = 3,6733) in the listed HRM tasks (mean > 3). The greatest need for training is in health and safety management, training and development of the staff and career planning of the staff. Shortlisting and interviews is, once again, not seen to be a training need, (mean < 3). Other functions in which respondents indicate a lesser need for training are disciplinary aspects and HR administration.

**Table 5.11: Training needs and the importance of aspects of HRM tasks of school principals in the Free State Province according to respondents without a B.Ed. (Honours) qualification**

| HRM tasks of school principals | Training needs (N = 163) | | Importance (N = 163) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,8098 | 9 | 4,5767 | 3 | -1,7669 | 0,000 * |
| | | | | | | |
| 2. Career planning of staff | 3,7546 | 6 | 4,4049 | 6 | -0,6503 | 0,000 * |
| | | | | | | |
| 3. Training and development of staff | 3,7791 | 5 | 4,5951 | 2 | -0,8160 | 0,000 * |
| | | | | | | |
| 4. Disciplinary aspects | 3,4049 | 8 | 4,5583 | 4 | -1,1534 | 0,000 * |
| | | | | | | |
| 5. Health and safety management | 3,8098 | 3 | 4,3988 | 7 | -0,5890 | 0,000 * |
| | | | | | | |
| 6. PA for non-educators | 3,7301 | 7 | 4,3252 | 8 | -0,5951 | 0,000 * |
| | | | | | | |
| 7. DAS for educators | 3,8528 | 2 | 4,2761 | 9 | -0,4233 | 0,000 * |
| | | | | | | |
| 8. HR Administration | 3,7914 | 4 | 4,4724 | 5 | -0,6810 | 0,000 * |
| | | | | | | |
| 9. Motivational techniques | 3,9632 | 1 | 4,6380 | 1 | -0,6748 | 0,000 * |
| | | | | | | |
| **Overall** | **3,6551** | | **4,4717** | | **-0,8166** | **0,000 *** |

* The difference is statistically significant if P<0,05.

**Table 5.12: Training needs and the importance of HRM tasks of school principals in the Free State Province according to respondents with a B.Ed. (Honours) qualification**

| HRM tasks of school principals | Training needs (N = 117) | | Importance (N = 117) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| 1. Shortlisting and interviews | 2,5812 | 9 | 4,4957 | 7 | -1,9145 | 0,000 * |
| 2. Career planning of staff | 3,8974 | 3 | 4,3675 | 9 | -0,4701 | 0,000 * |
| 3. Training and development of staff | 3,9316 | 1 | 4,7009 | 1 | -0,7692 | 0,000 * |
| 4. Disciplinary aspects | 3,5299 | 8 | 4,6838 | 2 | -1,1538 | 0,000 * |
| 5. Health and safety management | 3,9316 | 1 | 4,5128 | 6 | -0,5812 | 0,000 * |
| 6. PA for non-educators | 3,7863 | 6 | 4,4444 | 8 | -0,6581 | 0,000 * |
| 7. DAS for educators | 3,8462 | 4 | 4,5556 | 4 | -0,7094 | 0,000 * |
| 8. HR Administration | 3,7179 | 7 | 4,5299 | 5 | -0,8120 | 0,000 * |
| 9. Motivational techniques | 3,8376 | 5 | 4,6752 | 3 | -0,8376 | 0,000 * |
| **Overall** | **3,6733** | | **4,5518** | | **-0,8784** | **0,000 *** |

* The difference is statistically significant if P<0,05.

Respondents with a B.Ed. (Honours) degree rated training and development of staff as the most important HRM task, followed by disciplinary aspects and motivational techniques. Functions considered of minimally lesser importance are career planning of staff, PA for non-educators and shortlisting and interviews.

The overall difference of the mean score of training needs and the importance of HRM tasks of school principals and the differences in mean scores with regard to the listed HRM tasks are statistically significant.

## 5.3.4 Teaching experience

### 5.3.4.1 Respondents with 20 years and less teaching experience

A comparison between training needs and the importance of HRM tasks of school principals with 20 years and less teaching experience is shown in Table 5.13. Among the school principals with less teaching experience, results remain relatively in keeping with the trend, in that training needs still definitely exist (mean = 3,7028), together with a high regard for HRM tasks in general (mean = 4,5763). This sub-group also does not see a training need in shortlisting and interviews (mean < 3), with health and safety management, motivational techniques and training and development of staff being seen as the most important training needs. Disciplinary aspects and career planning of staff do show training needs (mean > 3), though they are ranked lower than the other tasks.

This sub-group of school principals consider motivational techniques, training and development of staff and disciplinary aspects their most important HRM tasks, while the career planning of staff, PA for non-educators and health and safety management are ranked marginally lower than the other tasks.

The overall difference in mean scores for training needs and the importance of HRM tasks of school principals and the differences in the mean scores with regard to the listed HRM tasks are statistically significant.

**Table 5.13:** **Training needs and the importance of HRM tasks of school principals in the Free State Province according to respondents with 20 years and less teaching experience**

| HRM tasks of school principals | Training needs (N = 123) | | Importance (N = 123) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| 1. Shortlisting and interviews | 2,6829 | 9 | 4,5285 | 5 | -1,8455 | 0,000 * |
| 2. Career planning of staff | 3,8130 | 7 | 4,4797 | 9 | -0,6667 | 0,000 * |
| 3. Training and development of staff | 3,8943 | 3 | 4,6911 | 1 | -0,7967 | 0,000 * |
| 4. Disciplinary aspects | 3,4715 | 8 | 4,6748 | 3 | -1,2033 | 0,000 * |
| 5. Health and safety management | 3,9593 | 1 | 4,5041 | 7 | -0,5447 | 0,000 * |
| 6. PA for non-educators | 3,8618 | 4 | 4,4959 | 8 | -0,6341 | 0,000 * |
| 7. DAS for educators | 3,8618 | 4 | 4,5285 | 5 | -0,6667 | 0,000 * |
| 8. HR Administration | 3,8455 | 6 | 4,5935 | 4 | -0,7480 | 0,000 * |
| 9. Motivational techniques | 3,9350 | 2 | 4,6911 | 1 | -0,7561 | 0,000 * |
| **Overall** | **3,7028** | | **4,5763** | | **-0,8735** | **0,000 *** |

* The difference is statistically significant if P<0,05.

**5.3.4.2 Respondents with more than 20 years teaching experience**

A comparison between training needs and the importance of HRM tasks of school principals with more than 20 years teaching experience is shown in Table 5.14. Apart from conforming to the overall trend thus far, in showing an overall need for training (mean = 3,6313) it shows an emphasis regarding HRM tasks of school principals in general (mean = 4,4494).

Apart from training in motivational techniques, which is ranked first again, training in DAS for educators and career planning of staff rank most highly among these respondents. Once again, training in shortlisting and interviews (mean < 3), is seen to be unnecessary, while training in disciplinary aspects and PA for non-educators are also viewed as less important.

Of all HRM tasks motivational techniques is again the most highly ranked task, followed by training and development of staff and disciplinary aspects. PA for non-educators, DAS for educators and career planning of staff are somewhat less important.

The overall difference in mean scores for training needs and the importance of HRM tasks of school principals and the differences in the mean scores with regard to the listed HRM tasks are statistically significant.

## 5.3.5 Experience as school principal

**5.3.5.1 Respondents with 10 years and less experience as school principal**

In Table 5.15 a comparison is drawn between training needs and the importance of HRM tasks of school principals in the Free State Province with 10 years and less experience as school principal. This sub-group shows evidence of training needs (mean = 3,6500), except in shortlisting and interviews (mean < 3). HRM tasks are all seen as very important (mean = 4,5100), while the strongest need for training is seen in motivational techniques, training and development of staff and DAS for educators. Respondents exhibit a lesser desire for training in disciplinary aspects and HR administration.

**Table 5.14:  Training needs and the importance of HRM tasks of school principals in the Free State Province according to respondents with more than 20 years teaching experience**

| HRM tasks of school principals | Training needs (N = 157) | | Importance (N = 157) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1.  Shortlisting and interviews | 2,7389 | 9 | 4,5541 | 4 | -1,8153 | 0,000 * |
| | | | | | | |
| 2.  Career planning of staff | 3,8153 | 3 | 4,3185 | 7 | -0,5032 | 0,000 * |
| | | | | | | |
| 3.  Training and development of staff | 3,8025 | 4 | 4,5987 | 2 | -0,7962 | 0,000 * |
| | | | | | | |
| 4.  Disciplinary aspects | 3,4459 | 8 | 4,5605 | 3 | -1,1146 | 0,000 * |
| | | | | | | |
| 5.  Health and safety management | 3,7834 | 5 | 4,4013 | 6 | -0,6178 | 0,000 * |
| | | | | | | |
| 6.  PA for non-educators | 3,6688 | 7 | 4,2803 | 9 | -0,6115 | 0,000 * |
| | | | | | | |
| 7.  DAS for educators | 3,8408 | 2 | 4,2866 | 8 | -0,4459 | 0,000 * |
| | | | | | | |
| 8.  HR Administration | 3,6943 | 6 | 4,4204 | 5 | -0,7261 | 0,000 * |
| | | | | | | |
| 9.  Motivational techniques | 3,8917 | 1 | 4,6242 | 1 | -0,7325 | 0,000 * |
| | | | | | | |
| **Overall** | **3,6313** | | **4,4494** | | **-0,8181** | **0,000 *** |

* The difference is statistically significant if P<0,05.

**Table 5.15: Training needs and the importance of HRM tasks of school principals in the Free State Province according to respondents with 10 years and less experience as school principal**

| HRM tasks of school principals | Training needs (N = 173) | | Importance (N = 173) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,7399 | 9 | 4,5087 | 5 | -1,7688 | 0,000 * |
| | | | | | | |
| 2. Career planning of staff | 3,8266 | 4 | 4,3873 | 7 | -0,5607 | 0,000 * |
| | | | | | | |
| 3. Training and development of staff | 3,8786 | 2 | 4,6185 | 2 | -0,7399 | 0,000 * |
| | | | | | | |
| 4. Disciplinary aspects | 3,3873 | 8 | 4,6185 | 2 | -1,2312 | 0,000 * |
| | | | | | | |
| 5. Health and safety management | 3,7977 | 5 | 4,4740 | 6 | -0,6763 | 0,000 * |
| | | | | | | |
| 6. PA for non-educators | 3,7225 | 6 | 4,3699 | 9 | -0,6474 | 0,000 * |
| | | | | | | |
| 7. DAS for educators | 3,8555 | 3 | 4,3873 | 7 | -0,5318 | 0,000 * |
| | | | | | | |
| 8. HR Administration | 3,7168 | 7 | 4,5318 | 4 | -0,8150 | 0,000 * |
| | | | | | | |
| 9. Motivational techniques | 3,9249 | 1 | 4,6936 | 1 | -0,7688 | 0,000 * |
| | | | | | | |
| **Overall** | **3,6500** | | **4,5100** | | **0,8600** | 0,000 * |

* The difference is statistically significant if P<0,05.

All HRM tasks are viewed as important (mean > 3), showing a definite overall importance (mean = 4,5100). The respondents selected motivational techniques, training and development of staff and disciplinary aspects as the most important HRM tasks in their functioning as school principals. Of lesser importance was PA for non-educators, DAS for educators and career planning of staff.

The overall difference in mean scores with regard to training needs and the importance of HRM tasks of school principals and the differences in mean scores with regard to the listed HRM tasks are statistically significant.

**5.3.5.2 Respondents with more than 10 years experience as school principal**

In Table 5.16 a comparison is drawn between training needs and the importance of HRM tasks of school principals in the Free State Province with more than 10 years experience as school principal. Apart from shortlisting and interviews (mean < 3), these respondents show evidence of a training need in all aspects of HRM (mean > 3).

HRM tasks is overall seen as very important (mean > 3). The greatest training need is in health and safety management, followed by motivational techniques and DAS for educators. Training in disciplinary aspects and the training and development of staff is less needed.

Overall respondents view HRM tasks as important (mean = 4,4974) with all the listed tasks playing an important role in the day-to-day management of a school (mean > 3). School principals with more than 10 years experience view training and development of staff, disciplinary aspects and shortlisting and interviews as their most important HRM functions. PA for non-educators, career planning of staff, health and safety management and DAS for educators are given slightly less priority.

The overall difference in mean scores with regard to training needs and the importance of HRM tasks of school principals and the differences in mean scores with regard to the listed HRM tasks are statistically significant.

**Table 5.16:** **Training needs and the importance of HRM tasks of school principals in the Free State Province according to respondents with more than 10 years experience as school principal**

| HRM tasks of school principals | Training needs (N = 107) | | Importance (N = 107) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| 1. Shortlisting and interviews | 2,6729 | 9 | 4,5981 | 2 | -1,9255 | 0,000 * |
| 2. Career planning of staff | 3,7944 | 6 | 4,3925 | 8 | -0,5981 | 0,000 * |
| 3. Training and development of staff | 3,7850 | 7 | 4,6729 | 1 | -0,8879 | 0,000 * |
| 4. Disciplinary aspects | 3,5701 | 8 | 4,5981 | 2 | -1,0280 | 0,000 * |
| 5. Health and safety management | 3,9626 | 1 | 4,4019 | 6 | -0,4393 | 0,000 * |
| 6. PA for non-educators | 3,8037 | 5 | 4,3832 | 9 | -0,5794 | 0,000 * |
| 7. DAS for educators | 3,8411 | 3 | 4,4019 | 6 | -0,5607 | 0,000 * |
| 8. HR Administration | 3,8318 | 4 | 4,4393 | 5 | -0,6075 | 0,000 * |
| 9. Motivational techniques | 3,8879 | 2 | 4,5888 | 4 | -0,7009 | 0,000 * |
| **Overall** | **3,6833** | | **4,4974** | | **-0,8141** | **0,000 *** |

* The difference is statistically significant if P<0,05.

## 5.4 TRAINING NEEDS AND IMPORTANCE OF HRM TASKS: COMPARISON BETWEEN DIFFERENT SUB-GROUPS OF RESPONDENTS

### 5.4.1 Training needs of male respondents compared with those of female respondents in the Free State Province

Table 5.17 shows a comparison is drawn between the training needs of male and female respondents in the Free State Province. Overall, female respondents indicate a greater need for training (mean = 3,8841) than their male counterparts (mean = 3,6192). The overall difference between the mean scores regarding the training needs of male and female respondents is, however, not statistically significant.

Both groups have a definite need for training in HRM tasks (mean > 3), although males show no need for training in shortlisting and interviews (mean < 3), while females are relatively neutral towards being trained in shortlisting and interviews (mean = 3).

Both male and female respondents indicate that training in motivational techniques is the highest priority, although the difference between how much emphasis is given to this need is statistically significant, with females showing a greater need for training in motivational techniques. Shortlisting and interviews is of the lowest priority in terms of training for both sub-groups and there is no statistical significance in the difference of the mean scores with regard to this HRM task. Although females show a greater training need with regard to all HRM tasks, it is only in the task of motivational techniques that the difference in mean scores is statistically significant.

### 5.4.2 Importance of HRM tasks of school principals according to male respondents compared with those of female respondents in the Free State Province

Table 5.18 shows a comparison between the importance of HRM tasks of school principals between male and female respondents in the Free State Province. The mean scores as indicated in Table 5.18 are very high, indicating that male and female

**Table 5.17:   Training needs of male respondents compared with training needs of female respondents in the Free State Province**

| HRM tasks of school principals | Male (N = 234) | | Female (N = 46) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,6581 | 9 | 3,0000 | 9 | -0,3419 | 0,126 |
| | | | | | | |
| 2. Career planning of staff | 3,7692 | 5 | 4,0435 | 3 | -0,2742 | 0,128 |
| | | | | | | |
| 3. Training and development of staff | 3,8077 | 3 | 4,0217 | 4 | -0,2140 | 0,208 |
| | | | | | | |
| 4. Disciplinary aspects | 3,4145 | 8 | 3,6739 | 8 | -0,2594 | 0,195 |
| | | | | | | |
| 5. Health and safety management | 3,8333 | 2 | 4,0000 | 5 | -0,1667 | 0,347 |
| | | | | | | |
| 6. PA for non-educators | 3,7179 | 6 | 3,9348 | 7 | -0,2168 | 0,271 |
| | | | | | | |
| 7. DAS for educators | 3,8034 | 4 | 4,0870 | 2 | -0,2835 | 0,136 |
| | | | | | | |
| 8. HR Administration | 3,7179 | 6 | 3,9783 | 6 | -0,2603 | 0,170 |
| | | | | | | |
| 9. Motivational techniques | 3,8504 | 1 | 4,2174 | 1 | -0,3670 | 0,046 * |
| | | | | | | |
| **Overall** | **3,6192** | | **3,8841** | | **-0,2649** | **0,067** |

\* The difference is statistically significant if P<0,05.

**Table 5.18:  Importance of HRM tasks of school principals according to male respondents compared with those of female respondents in the Free State Province**

| HRM tasks of school principals | Male (N = 234) | | Female (N = 46) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| 1. Shortlisting and interviews | 4,5385 | 4 | 4,5652 | 5 | -0,0268 | 0,836 |
| 2. Career planning of staff | 4,3547 | 9 | 4,5652 | 5 | -0,2105 | 0,101 |
| 3. Training and development of staff | 4,6325 | 2 | 4,6739 | 1 | -0,0414 | 0,676 |
| 4. Disciplinary aspects | 4,6154 | 3 | 4,5870 | 4 | 0,0284 | 0,784 |
| 5. Health and safety management | 4,4530 | 6 | 4,4130 | 7 | 0,0399 | 0,745 |
| 6. PA for non-educators | 4,3889 | 8 | 4,3043 | 9 | 0,0845 | 0,544 |
| 7. DAS for educators | 4,4060 | 7 | 4,3261 | 8 | 0,0799 | 0,570 |
| 8. HR Administration | 4,4658 | 5 | 4,6522 | 3 | -0,1864 | 0,110 |
| 9. Motivational techniques | 4,6496 | 1 | 4,6739 | 1 | -0,0243 | 0,821 |
| **Overall** | **4,5005** | | **4,5290** | | **-0,0285** | **0,749** |

* The difference is statistically significant if P<0,05.

respondents consider the listed HRM tasks of the school principal as very important in their careers. The overall importance assigned to HRM by females (mean = 4,5290) is slightly higher than that assigned by males (mean = 4,5005). This difference is, however, not statistically significant. Both groups consider all the listed HRM tasks of the school principal as important (mean > 3).

Both male and female respondents see motivational techniques as their most important HRM task, but female respondents value the training and development of staff just as highly. The difference in mean scores is, however, not statistically significant. Male respondents perceive career planning of staff as their least important task and female respondents, in turn, value DAS for educators least important.

Male respondents place a higher value on four HRM tasks, but these differences in the mean scores are not statistically significant. Female respondents assign higher values to the remaining five tasks, but these differences in the mean scores are not statistically significant either.

## 5.4.3 Training needs of respondents 40 years and younger compared with those of respondents older than 40 years in the Free State Province

In Table 5.19 the training needs of respondents 40 years and younger are compared with those of respondents older than 40 years in the Free State Province. Overall, respondents older than 40 years show a greater need for training (mean = 3,6963) than respondents 40 years and younger (mean = 3,5367), but the difference in mean scores is small and not statistically significant. Both groups desire training in all HRM tasks of the school principal (mean > 3), except in the case of shortlisting and interviews, where both groups do not have a training need (means < 3).

Both groups consider motivational techniques their greatest training need and the difference between the mean scores is not statistically significant. The difference in the mean scores between their lowest ranked training need in both sub-groups, shortlisting and interviews, is also not statistically significant. Although respondents

**Table 5.19:  Training needs of respondents 40 years and younger compared with those of respondents older than 40 years in the Free State Province**

| HRM tasks of school principals | 40 years and younger (N = 59) | | Older than 40 years (N = 221) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| 1. Shortlisting and interviews | 2,4746 | 9 | 2,7783 | 9 | -0,3037 | 0,135 |
| 2. Career planning of staff | 3,7119 | 4 | 3,8416 | 5 | -0,1298 | 0,429 |
| 3. Training and development of staff | 3,7288 | 2 | 3,8733 | 4 | -0,1445 | 0,350 |
| 4. Disciplinary aspects | 3,2034 | 8 | 3,5249 | 8 | -0,3215 | 0,077 |
| 5. Health and safety management | 3,6949 | 6 | 3,9050 | 2 | -0,2101 | 0,192 |
| 6. PA for non-educators | 3,6780 | 7 | 3,7738 | 6 | -0,0958 | 0,592 |
| 7. DAS for educators | 3,7288 | 2 | 3,8824 | 3 | -0,1535 | 0,375 |
| 8. HR Administration | 3,7119 | 4 | 3,7738 | 6 | -0,0619 | 0,720 |
| 9. Motivational techniques | 3,8983 | 1 | 3,9140 | 1 | -0,0157 | 0,925 |
| **Overall** | **3,5367** | | **3,6963** | | **-0,1596** | **0,225** |

* The difference is statistically significant if P<0,05.

older than 40 years show a greater desire for training in each of the listed HRM tasks than respondents 40 years and younger, the differences in the mean scores regarding training needs are not large enough to be statistically significant.

### 5.4.4 Importance of HRM tasks of school principals according to respondents 40 years and younger compared with those of respondents older than 40 years in the Free State Province

In Table 5.20 the importance of HRM tasks of school principals in the Free State Province, between respondents 40 years and younger and respondents older than 40 years are compared. Although respondents 40 years and younger (mean = 4,5932) see the listed HRM tasks as more important than respondents older than 40 years (mean = 4,4816), the difference in mean scores is not statistically significant. Both sub-groups have very high mean scores, indicating their high regard for their HRM tasks and their roles as school principals (mean > 3).

Respondents 40 years and younger see training and development as their most important HRM task, while respondents older than 40 years place motivational techniques first. Respondents 40 years and younger value shortlisting and interviews least, while respondents older than 40 years place PA for non-educators at the bottom of their priority list. Both these tasks are still considered very highly in the greater context, of course (mean > 3).

Respondents 40 years and younger attach greater importance to all the listed HRM tasks than respondents older than 40 years, except in the case of shortlisting and interviews, but the differences in mean scores regarding the importance HRM tasks of school principals in all cases are not statistically significant.

### 5.4.5 Training needs of respondents without B.Ed. (Honours) qualifications compared with those of respondents who have B.Ed. (Honours) qualifications in the Free State Province

**Table 5.20: Importance of HRM tasks of school principals according to respondents 40 years and younger compared with those of respondents older than 40 years in the Free State Province**

| HRM tasks of school principals | 40 years and younger (N = 59) | | Older than 40 years (N = 221) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 4,4915 | 9 | 4,5566 | 4 | -0,0650 | 0,579 |
| | | | | | | |
| 2. Career planning of staff | 4,5085 | 8 | 4,3575 | 7 | 0,1510 | 0,196 |
| | | | | | | |
| 3. Training and development of staff | 4,7288 | 1 | 4,6154 | 2 | 0,1134 | 0,207 |
| | | | | | | |
| 4. Disciplinary aspects | 4,6780 | 3 | 4,5928 | 3 | 0,0852 | 0,365 |
| | | | | | | |
| 5. Health and safety management | 4,5763 | 5 | 4,4118 | 6 | 0,1645 | 0,140 |
| | | | | | | |
| 6. PA for non-educators | 4,5424 | 6 | 4,3303 | 9 | 0,2121 | 0,094 |
| | | | | | | |
| 7. DAS for educators | 4,5254 | 7 | 4,3575 | 7 | 0,1680 | 0,188 |
| | | | | | | |
| 8. HR Administration | 4,5932 | 4 | 4,4706 | 5 | 0,1226 | 0,248 |
| | | | | | | |
| 9. Motivational techniques | 4,6949 | 2 | 4,6425 | 1 | 0,0524 | 0,592 |
| | | | | | | |
| **Overall** | **4,5932** | | **4,4816** | | **0,1116** | **0,167** |

* The difference is statistically significant if P<0,05.

Training needs of respondents with B.Ed. (Honours) qualifications in the Free State Province are compared with training needs of respondents without B.Ed. (Honours) qualifications in the Free State Province in Table 5.21. Overall, respondents with B.Ed. (Honours) qualifications (mean = 3,6738) have a slightly higher need for training than respondents who do not have B.Ed. (Honours) qualifications (mean = 3,6551). The difference in the overall mean regarding the importance of HRM tasks of school principals is not significant statistically. Both groups do not express a need for training in shortlisting and interviews (mean < 3), although all other tasks show training needs with mean scores higher than 3.

Respondents with a B.Ed. (Honours) name training and development of staff as their greatest training need, while those without the B.Ed. (Honours) chose motivational techniques as their highest training need.

Respondents who have a B.Ed. (Honours) qualification value five tasks marginally higher than those who do not have a B.Ed. (Honours) qualification, but the differences in mean scores regarding training needs between the two sub-groups in all nine tasks are not statistically significant.


## 5.4.6 Importance of HRM tasks of school principals according to respondents without B.Ed. (Honours) qualifications compared with those of respondents who have B.Ed. (Honours) qualifications in the Free State Province

The importance of HRM tasks of the school principal according to respondents without B.Ed. (Honours) qualifications with the responses of respondents with B.Ed. (Honours) qualifications in the Free State Province are compared in Table 5.22. The mean scores for the importance of HRM tasks of the school principal are high in both sub-groups, indicating a high regard for the school principal's HRM function (means > 3). Respondents with a B.Ed. (Honours) qualification do show a higher mean score overall, (mean = 4,5518) compared to respondents without a B.Ed. (Honours) qualification  (mean = 4,4717), but the difference here is not statistically significant.

**Table 5.21:** **Training needs of respondents without B.Ed. (Honours) qualifications compared with those of respondents who have B.Ed. (Honours) qualifications in the Free State Province**

| HRM tasks of school principals | No B.Ed. (Honours) qualifications (N = 163) | | B.Ed. (Honours) qualifications (N = 117) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,8098 | 9 | 2,5812 | 9 | 0,2286 | 0,174 |
| | | | | | | |
| 2. Career planning of staff | 3,7546 | 6 | 3,8974 | 3 | -0,1428 | 0,292 |
| | | | | | | |
| 3. Training and development of staff | 3,7791 | 5 | 3,9316 | 1 | -0,1525 | 0,233 |
| | | | | | | |
| 4. Disciplinary aspects | 3,4049 | 8 | 3,5299 | 8 | -0,1250 | 0,407 |
| | | | | | | |
| 5. Health and safety management | 3,8098 | 3 | 3,9316 | 1 | -0,1218 | 0,36 |
| | | | | | | |
| 6. PA for non-educators | 3,7301 | 7 | 3,7863 | 6 | -0,0563 | 0,704 |
| | | | | | | |
| 7. DAS for educators | 3,8528 | 2 | 3,8462 | 4 | 0,0066 | 0,963 |
| | | | | | | |
| 8. HR Administration | 3,7914 | 4 | 3,7179 | 7 | 0,0735 | 0,607 |
| | | | | | | |
| 9. Motivational techniques | 3,9632 | 1 | 3,8376 | 5 | 0,1256 | 0,366 |
| | | | | | | |
| **Overall** | **3,6551** | | **3,6733** | | **-0,0182** | **0,867** |

* The difference is statistically significant if P<0,05.

**Table 5.22: Importance of HRM tasks of school principals according to respondents without B.Ed. (Honours) qualifications compared with those of respondents who have B.Ed. (Honours) qualifications in the Free State Province**

| HRM tasks of school principals | No B.Ed.(Honours) qualifications (N = 163) | | B.Ed.(Honours) qualifications (N = 117) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| 1. Shortlisting and interviews | 4,5767 | 3 | 4,4957 | 7 | 0,0810 | 0,403 |
| 2. Career planning of staff | 4,4049 | 6 | 4,3675 | 9 | 0,0374 | 0,699 |
| 3. Training and development of staff | 4,5951 | 2 | 4,7009 | 1 | -0,1058 | 0,154 |
| 4. Disciplinary aspects | 4,5583 | 4 | 4,6838 | 2 | -0,1255 | 0,106 |
| 5. Health and safety management | 4,3988 | 7 | 4,5128 | 6 | -0,1140 | 0,216 |
| 6. PA for non-educators | 4,3252 | 8 | 4,4444 | 8 | -0,1193 | 0,254 |
| 7. DAS for educators | 4,2761 | 9 | 4,5556 | 4 | -0,2795 | 0,008 * |
| 8. HR Administration | 4,4724 | 5 | 4,5299 | 5 | -0,0575 | 0,513 |
| 9. Motivational techniques | 4,6380 | 1 | 4,6752 | 3 | -0,0372 | 0,645 |
| **Overall** | **4,4717** | | **4,5518** | | **-0,0800** | **0,231** |

* The difference is statistically significant if P<0,05.

Both groups rate each of the HRM tasks very highly.

Respondents who have the B.Ed. (Honours) qualification consider the training and development of staff their most important HRM function, while those who do not have a B.Ed. (Honours) qualification identify motivational techniques as most important. Of lowest priority are the career planning of staff and DAS for educators for those with and without the B.Ed. (Honours) degree respectively.

Those with the B.Ed. (Honours) degree value seven of the nine listed tasks higher than those who do not have a B.Ed. (Honours) qualification, but these differences are not statistically significant, except in the case of DAS for educators. The two remaining tasks are viewed as more important by the respondents without the B.Ed. (Honours) degree, without any significant statistical differences in the mean scores.

## 5.4.7   Training needs of respondents in the Free State Province with 20 years and less teaching experience compared with those of respondents who have more than 20 years teaching experience

Table 5.23 shows the training needs of respondents in the Free State Province with 20 years and less teaching experience compared with those of respondents in the Free State Province with more than 20 years of teaching experience. Respondents with 20 years and less teaching experience do show a slightly higher overall training need (mean = 3,7028) as opposed to respondents with more than 20 years teaching experience (mean = 3,6313), but this difference in the mean scores is not statistically significant. All listed HRM tasks show a training need for both sub-groups (mean > 3), except for shortlisting and interviews (mean < 3), in which both sub-groups feel they do not need training.

Respondents with less than 20 years and less teaching experience's biggest training need is in health and safety management, while respondents with more than 20 years of teaching experience perceive motivational techniques as their biggest training need.

**Table 5.23: Training needs, of respondents in the Free State Province, with 20 years and less teaching experience compared with those of respondents who have more than 20 years teaching experience**

| HRM tasks of school principals | 20 years and less teaching experience (N = 123) | | More than 20 years teaching experience (N = 157) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,6829 | 9 | 2,7389 | 9 | -0,0559 | 0,738 |
| | | | | | | |
| 2. Career planning of staff | 3,8130 | 7 | 3,8153 | 3 | -0,0023 | 0,987 |
| | | | | | | |
| 3. Training and development of staff | 3,8943 | 3 | 3,8025 | 4 | 0,0918 | 0,470 |
| | | | | | | |
| 4. Disciplinary aspects | 3,4715 | 8 | 3,4459 | 8 | 0,0257 | 0,864 |
| | | | | | | |
| 5. Health and safety management | 3,9593 | 1 | 3,7834 | 5 | 0,1759 | 0,183 |
| | | | | | | |
| 6. PA for non-educators | 3,8618 | 4 | 3,6688 | 7 | 0,1930 | 0,189 |
| | | | | | | |
| 7. DAS for educators | 3,8618 | 4 | 3,8408 | 2 | 0,0210 | 0,883 |
| | | | | | | |
| 8. HR Administration | 3,8455 | 6 | 3,6943 | 6 | 0,1513 | 0,286 |
| | | | | | | |
| 9. Motivational techniques | 3,9350 | 2 | 3,8917 | 1 | 0,0432 | 0,754 |
| | | | | | | |
| **Overall** | **3,7028** | | **3,6313** | | **0,0715** | **0,509** |

* The difference is statistically significant if P<0,05.

Respondents with less 20 years and less teaching experience have a greater training need in seven of the listed HRM tasks, with no statistically significant differences, while the two tasks that respondents with more than 20 years of teaching experience rate more highly in terms of training also do not show marked statistical differences.

### 5.4.8 Importance of HRM tasks of school principals in the Free State Province according to respondents with 20 years and less teaching experience compared with those of respondents who have more than 20 years teaching experience

Table 5.24 shows the importance of HRM tasks of school principals in the Free State Province with 20 years and less teaching experience compared with those respondents who have more than 20 years teaching experience. Once again, the high mean scores assigned to the importance of HRM tasks (mean > 3), indicate that both groups prize all of the tasks as management tools.

Overall, respondents with 20 years and less teaching experience (mean = 4,5763) value HRM tasks slightly more highly than their less experienced counterparts (mean = 4,4494), but this difference in mean scores is not statistically significant.

Both sub-groups regard motivational techniques as the most important HRM task with the difference here being statistically insignificant. Career planning of staff comes up as the least important task among respondents with 20 years and less teaching experience, with PA for non-educators taking lowest rank among respondents with more than 20 years of teaching experience.

Respondents with more than 20 years of teaching experience rank only shortlisting and interviews more highly than the other sub-group, which ranks all remaining eight of HRM tasks more important. The only HRM tasks that exhibit significant statistical differences in the mean scores between the sub-groups are PA for non-educators, DAS for educators and HR administration.

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**Table 5.24:** **Importance of HRM tasks of school principals in the Free State Province according to respondents with 20 years and less teaching experience compared with those of respondents who have more than 20 years teaching experience**

| HRM tasks of school principals | 20 years and less teaching experience (N = 123) | | More than 20 years teaching experience (N = 157) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| 1. Shortlisting and interviews | 4,5285 | 5 | 4,5541 | 4 | -0,0257 | 0,790 |
| 2. Career planning of staff | 4,4797 | 9 | 4,3185 | 7 | 0,1612 | 0,092 |
| 3. Training and development of staff | 4,6911 | 1 | 4,5987 | 2 | 0,0923 | 0,211 |
| 4. Disciplinary aspects | 4,6748 | 3 | 4,5605 | 3 | 0,1143 | 0,139 |
| 5. Health and safety management | 4,5041 | 7 | 4,4013 | 6 | 0,1028 | 0,262 |
| 6. PA for non-educators | 4,4959 | 8 | 4,2803 | 9 | 0,2157 | 0,038 * |
| 7. DAS for educators | 4,5285 | 5 | 4,2866 | 8 | 0,2418 | 0,021 * |
| 8. HR Administration | 4,5935 | 4 | 4,4204 | 5 | 0,1731 | 0,047 * |
| 9. Motivational techniques | 4,6911 | 1 | 4,6242 | 1 | 0,0669 | 0,405 |
| **Overall** | **4,5763** | | **4,4494** | | **0,1269** | **0,055** |

\* The difference is statistically significant if P<0,05.

## 5.4.9 Training needs of respondents in the Free State Province with 10 years and less experience as school principal compared with those of respondents with more than 10 years experience as school principal

In Table 5.25 the training needs of respondents in the Free State Province with 10 years and less experience as school principal are compared with those of respondents with more than 10 years experience as school principal. Though statistically insignificant, respondents with more than 10 years of experience as school principal have a marginally higher need for training (mean = 3,6833) than those respondents with 10 years and less experience as school principal (mean = 3,6500).

Both sub-groups indicate that only shortlisting and interviews are not a training need (mean < 3), while all other listed HRM tasks show definite training needs (mean > 3). Respondents with 10 years and less teaching experience see motivational techniques as their greatest training need, while the other group of respondents desire training most in health and safety management.

Respondents with 10 years and less experience as school principal have a greater need for training in five HRM tasks, as compared to the respondents with more than 10 years of experience who show greater need in the remaining four. There are, however, no significant statistical differences in the mean scores with regard to training needs among the sub-groups with respect to any of the listed HRM tasks.

## 5.4.10 Importance of HRM tasks of school principals in the Free State Province for respondents with 10 years and less experience as school principal compared with those of respondents who have more than 10 years of experience as school principal

In Table 5.26 the importance of HRM tasks of school principals in the Free State Province are compared between respondents with 10 years and less experience as

**Table 5.25: Training needs of respondents in the Free State Province with 10 years and less experience as school principal compared with those of respondents with more than 10 years experience as school principal**

| HRM tasks of school principals | Less than 10 years experience as school principal (N = 173) | | More than 10 years experience as school principal (N = 107) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,7399 | 9 | 2,6729 | 9 | 0,0670 | 0,695 |
| | | | | | | |
| 2. Career planning of staff | 3,8266 | 4 | 3,7944 | 6 | 0,0322 | 0,815 |
| | | | | | | |
| 3. Training and development of staff | 3,8786 | 2 | 3,7850 | 7 | 0,0936 | 0,471 |
| | | | | | | |
| 4. Disciplinary aspects | 3,3873 | 8 | 3,5701 | 8 | -0,1828 | 0,232 |
| | | | | | | |
| 5. Health and safety management | 3,7977 | 5 | 3,9626 | 1 | -0,1649 | 0,222 |
| | | | | | | |
| 6. PA for non-educators | 3,7225 | 6 | 3,8037 | 5 | -0,0812 | 0,589 |
| | | | | | | |
| 7. DAS for educators | 3,8555 | 3 | 3,8411 | 3 | 0,0144 | 0,921 |
| | | | | | | |
| 8. HR Administration | 3,7168 | 7 | 3,8318 | 4 | -0,1150 | 0,427 |
| | | | | | | |
| 9. Motivational techniques | 3,9249 | 1 | 3,8879 | 2 | 0,0370 | 0,793 |
| | | | | | | |
| **Overall** | **3,6500** | | **3,6833** | | **-0,0333** | **0,763** |

* The difference is statistically significant if P<0,05.

**Table 5.26: Importance of HRM tasks of school principals according to respondents with 10 years and less experience as school principal compared with those of respondents who have more than 10 years experience as school principal in the Free State Province**

| HRM tasks of school principals | Less than 10 years experience as school principal (N = 173) | | More than 10 years experience as school principal (N = 107) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| 1. Shortlisting and interviews | 4,5087 | 5 | 4,5981 | 2 | -0,0895 | 0,363 |
| 2. Career planning of staff | 4,3873 | 7 | 4,3925 | 8 | -0,0052 | 0,957 |
| 3. Training and development of staff | 4,6185 | 2 | 4,6729 | 1 | -0,0544 | 0,471 |
| 4. Disciplinary aspects | 4,6185 | 2 | 4,5981 | 2 | 0,0204 | 0,797 |
| 5. Health and safety management | 4,4740 | 6 | 4,4019 | 6 | 0,0721 | 0,441 |
| 6. PA for non-educators | 4,3699 | 9 | 4,3832 | 9 | -0,0132 | 0,901 |
| 7. DAS for educators | 4,3873 | 7 | 4,4019 | 6 | -0,0146 | 0,892 |
| 8. HR Administration | 4,5318 | 4 | 4,4393 | 5 | 0,0925 | 0,299 |
| 9. Motivational techniques | 4,6936 | 1 | 4,5888 | 4 | 0,1049 | 0,200 |
| **Overall** | **4,5100** | | **4,4974** | | **0,0126** | **0,853** |

* The difference is statistically significant if P<0,05.

school principal, with respondents with more than 10 years experience as school principal. Both sub-groups place great importance on all HRM tasks (means > 3).

There is no statistical significance in the overall mean scores regarding the importance of HRM tasks of school principals in that respondents with 10 years and less experience (mean = 4,5100) as school principal view the listed HRM tasks as slightly more important than the respondents with more than 10 years experience as school principal (mean = 4,4974).

Respondents with 10 years and less experience as school principal regard motivational techniques as their most important HRM task, and respondents with more than 10 years assign highest importance to the training and development of staff. Both groups consider PA for non-educators as of marginally less importance. There is no statistically significant difference in the mean scores of listed HRM tasks with reference to the importance the respondents assign to them.

Respondents with more than 10 years experience as school principal place five of HRM tasks higher on the scale of importance, with no statistically significant differences in the mean scores, and the same holds for the four HRM tasks that the respondents with 10 years and less experience rank more highly.

## 5.5  TRAINING NEEDS AND THE IMPORTANCE OF HRM TASKS: COMPARISON BETWEEN THE DIFFERENT EDUCATION DISTRICTS

### 5.5.1  Training needs of school principals and the importance of HRM tasks of school principals compared between the Xhariep Education District and the Motheo Education District

#### 5.5.1.1  Training needs of school principals compared between the Xhariep Education District and the Motheo Education District

Table 5.27 shows a comparison between training needs in the Xhariep Education District and the Motheo Education District. The greater need for training among respondents from the Motheo Education District (mean = 3,7014) as compared to respondents from the Xhariep Education District (mean = 3,5979) is not statistically significant according to mean scores regarding training needs. Both groups desire training in all HRM tasks (mean > 3), except shortlisting and interviews (mean < 3), where no training is needed.

Respondents from the Motheo Education District have a greater need for training in six of the nine listed HRM tasks, but none of these show statistically significant differences according to mean scores regarding training needs, and the same applies to the three higher training needs that the respondents from the Xhariep Education District have.

### 5.5.1.2   Importance of HRM tasks of school principals compared between Xhariep Education District and Motheo Education District

Table 5.28 shows a comparison between training needs in the Xhariep Education District and the Motheo Education District. There is also little statistical significance in the mean overall and individual scores with reference to the importance of HRM tasks of school principals for these two sub-groups.

Both sub-groups see all HRM tasks as very important (mean > 3), with the Motheo Education District displaying an overall mean score of 3,7014 compared to the Xhariep Education District with an overall mean score of 3,5979.

Respondents from the Xhariep Education District place a statistically insignificant higher value, according to mean scores, on seven of the listed HRM tasks. The differences in the two tasks on which the Motheo Education District's respondents place a more important value also do not have statistical significance according to the mean scores of the two sub-groups.

**Table 5.27:** **Training needs of respondents in the Xhariep Education District compared with those of respondents in the Motheo Education District**

| HRM tasks of school principals | Xhariep (N = 21) | | Motheo (N = 80) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,8571 | 9 | 2,8000 | 9 | 0,0571 | 0,867 |
| | | | | | | |
| 2. Career planning of staff | 3,8095 | 3 | 3,8750 | 3 | -0,655 | 0,815 |
| | | | | | | |
| 3. Training and development of staff | 3,8095 | 3 | 3,8625 | 4 | -0,0530 | 0,849 |
| | | | | | | |
| 4. Disciplinary aspects | 3,0476 | 8 | 3,5625 | 8 | -0,5149 | 0,096 |
| | | | | | | |
| 5. Health and safety management | 3,9048 | 2 | 3,8125 | 5 | 0,0923 | 0,703 |
| | | | | | | |
| 6. PA for non-educators | 3,5238 | 7 | 3,7000 | 7 | -0,1762 | 0,544 |
| | | | | | | |
| 7. DAS for educators | 3,6667 | 6 | 4,0125 | 1 | -0,3458 | 0,199 |
| | | | | | | |
| 8. HR Administration | 3,9524 | 1 | 3,7875 | 6 | 0,1649 | 0,547 |
| | | | | | | |
| 9. Motivational techniques | 3,8095 | 3 | 3,9000 | 2 | -0,0905 | 0,754 |
| | | | | | | |
| **Overall** | **3,5979** | | **3,7014** | | **-0,1035** | **0,632** |

* The difference is statistically significant if P<0,05.

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**Table 5.28: Importance of HRM tasks of school principals of Xhariep Education District compared with those of respondents of the Motheo Education District**

| HRM tasks of school principals | Xhariep (N = 21) | | Motheo (N = 80) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 4,7619 | 2 | 4,4875 | 4 | 0,2744 | 0,139 |
| | | | | | | |
| 2. Career planning of staff | 4,2381 | 9 | 4,3500 | 9 | -0,1119 | 0,559 |
| | | | | | | |
| 3. Training and development of staff | 4,7619 | 2 | 4,6000 | 1 | 0,1619 | 0,192 |
| | | | | | | |
| 4. Disciplinary aspects | 4,8095 | 1 | 4,5375 | 3 | 0,2720 | 0,051 |
| | | | | | | |
| 5. Health and safety management | 4,4286 | 6 | 4,4000 | 8 | 0,0286 | 0,859 |
| | | | | | | |
| 6. PA for non-educators | 4,4286 | 6 | 4,3375 | 7 | 0,0911 | 0,657 |
| | | | | | | |
| 7. DAS for educators | 4,4286 | 6 | 4,4375 | 6 | -0,0089 | 0,961 |
| | | | | | | |
| 8. HR Administration | 4,6190 | 5 | 4,4500 | 5 | 0,1690 | 0,347 |
| | | | | | | |
| 9. Motivational techniques | 4,6667 | 4 | 4,6000 | 1 | 0,0667 | 0,677 |
| | | | | | | |
| **Overall** | **4,5714** | | **4,4667** | | **0,1048** | **0,366** |

* The difference is statistically significant if P<0,05.

## 5.5.2 Training needs of school principals and the importance of HRM tasks of school principals compared between the Xhariep Education District and the Lejweleputswa Education District

### 5.5.2.1 Training needs of school principals compared between the Xhariep Education District and the Lejweleputswa Education District

In Table 5.29 the training needs of respondents in the Xhariep Education District is compared with the training needs of respondents in the Lejweleputswa Education District. Once again, there is no statistical significant difference that can be assigned to the fact that respondents in the Xhariep Education District (mean = 3,5979) exhibit a slightly higher need for training than respondents from the Lejweleputswa Education District (mean = 3,5887). Definite training is needed (mean > 3) in all listed HRM tasks, except for shortlisting and interviews in both cases (mean < 3), where no training is required by respondents.

Respondents from the Xhariep Education District have a greater need for training in five HRM tasks, while Lejweleputswa Education District has a greater need in the remaining four. None of these differences according to the mean scores regarding the training needs of school principals are statistically significant, however.

### 5.5.2.2 Importance of HRM tasks of school principals compared between the Xhariep Education District and the Lejweleputswa Education District

In Table 5.30 the importance of HRM tasks are compared between respondents in the Xhariep Education District and the Lejweleputswa Education District. The slight difference in overall mean scores regarding the importance of HRM tasks between Xhariep Education District (mean = 4,5714) and Lejweleputswa Education District (mean = 4,4581) is not statistically significant, since both consider the HRM tasks very important (mean > 3).

Although respondents from the Xhariep Education District assign greater importance to eight of the nine HRM tasks, the differences between these mean scores with reference to the importance of HRM tasks of school principals and those from the Lejweleputswa Education District are not statistically significant.

**Table 5.29: Training needs of respondents in the Xhariep Education District compared with those of respondents in the Lejweleputswa Education District**

| HRM tasks of school principals | Xhariep (N = 21) | | Lejweleputswa (N = 57) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| 1. Shortlisting and interviews | 2,8571 | 9 | 2,6667 | 9 | 0,1905 | 0,603 |
| 2. Career planning of staff | 3,8095 | 3 | 3,6140 | 7 | 0,1955 | 0,539 |
| 3. Training and development of staff | 3,8095 | 3 | 3,7193 | 6 | 0,0902 | 0,745 |
| 4. Disciplinary aspects | 3,0476 | 8 | 3,3158 | 8 | -0,2682 | 0,404 |
| 5. Health and safety management | 3,9048 | 2 | 3,8070 | 2 | 0,0977 | 0,733 |
| 6. PA for non-educators | 3,5238 | 7 | 3,7368 | 5 | -0,2130 | 0,506 |
| 7. DAS for educators | 3,6667 | 6 | 3,8070 | 2 | -0,1404 | 0,625 |
| 8. HR Administration | 3,9524 | 1 | 3,7544 | 4 | 0,1980 | 0,504 |
| 9. Motivational techniques | 3,8095 | 3 | 3,8772 | 1 | -0,0677 | 0,829 |
| **Overall** | **3,5979** | | **3,5887** | | **0,0092** | **0,969** |

* The difference is statistically significant if P<0,05.

**Table 5.30: Importance of HRM tasks of school principals in the Xhariep Education District compared with those of respondents in the Lejweleputswa Education District**

| HRM tasks of school principals | Xhariep (N = 21) | | Lejweleputswa (N = 57) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| 1. Shortlisting and interviews | 4,7619 | 2 | 4,5088 | 5 | 0,2531 | 0,186 |
| 2. Career planning of staff | 4,2381 | 9 | 4,2105 | 9 | 0,0276 | 0,909 |
| 3. Training and development of staff | 4,7619 | 2 | 4,6491 | 2 | 0,1128 | 0,503 |
| 4. Disciplinary aspects | 4,8095 | 1 | 4,5965 | 3 | 0,2130 | 0,195 |
| 5. Health and safety management | 4,4286 | 6 | 4,4035 | 6 | 0,0251 | 0,908 |
| 6. PA for non-educators | 4,4286 | 6 | 4,3158 | 7 | 0,1128 | 0,630 |
| 7. DAS for educators | 4,4286 | 6 | 4,2281 | 8 | 0,2005 | 0,426 |
| 8. HR Administration | 4,6190 | 5 | 4,5263 | 4 | 0,0927 | 0,623 |
| 9. Motivational techniques | 4,6667 | 4 | 4,6842 | 1 | -0,0175 | 0,920 |
| **Overall** | **4,5714** | | **4,4581** | | **0,1133** | **0,480** |

* The difference is statistically significant if P<0,05.

## 5.5.3 Training needs of school principals and the importance of HRM tasks of school principals compared between the Xhariep Education District and the Thabo Mofutsanyana Education District

### 5.5.3.1 Training needs of school principals compared between respondents in the Xhariep Education District and the Thabo Mofutsanyana Education District

The comparison between training needs in the Xhariep Education District and the Thabo Mofutsanyana Education District is shown in Table 5.31. The difference between the mean scores regarding training needs of respondents in the Thabo Mofutsanyana Education District (mean = 3,8172) and the Xhariep Education District (mean = 3,5979) is not of statistical significance. Both groups of respondents have training needs with regard to all HRM tasks (mean > 3), except with regard to shortlisting and interviews (mean < 3).

Both education districts have similar mean scores for all nine HRM tasks, making the differences statistically unimportant regarding training needs, although respondents in the Thabo Mofutsanyana Education District indicate a slightly higher need for training in eight of the nine tasks.

### 5.5.3.2 Importance of HRM tasks of school principals compared between respondents in the Xhariep Education District and the Thabo Mofutsanyana Education District

The importance of HRM tasks of school principals are compared between the Xhariep Education District and the Thabo Mofutsanyana Education District and the results are shown in Table 5.32. The overall mean scores regarding the importance of HRM tasks on the whole are also very high and very close between the two education districts. Thabo Mofutsanyana Education District's respondents indicate a slightly higher importance for the HRM tasks (mean = 4,6020), but this is too close to Xhariep Education District's overall mean (mean = 4,5714) to be statistically significant.

**Table 5.31: Training needs of respondents in the Xhariep Education District compared with those of respondents in the Thabo Mofutsanyana Education District**

| HRM tasks of school principals | Xhariep (N = 21) | | Thabo Mofutsanyana (N = 79) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,8571 | 9 | 2,8987 | 9 | -0,0416 | 0,901 |
| | | | | | | |
| 2. Career planning of staff | 3,8095 | 3 | 4,0253 | 2 | -0,2158 | 0,407 |
| | | | | | | |
| 3. Training and development of staff | 3,8095 | 3 | 4,0127 | 3 | -0,2031 | 0,374 |
| | | | | | | |
| 4. Disciplinary aspects | 3,0476 | 8 | 3,6203 | 8 | -0,5726 | 0,062 |
| | | | | | | |
| 5. Health and safety management | 3,9048 | 2 | 3,9620 | 4 | -0,573 | 0,840 |
| | | | | | | |
| 6. PA for non-educators | 3,5238 | 7 | 3,9367 | 6 | -0,4129 | 0,162 |
| | | | | | | |
| 7. DAS for educators | 3,6667 | 6 | 3,9620 | 4 | -0,2954 | 0,326 |
| | | | | | | |
| 8. HR Administration | 3,9524 | 1 | 3,8734 | 7 | 0,0790 | 0,772 |
| | | | | | | |
| 9. Motivational techniques | 3,8095 | 3 | 4,0633 | 1 | -0,2538 | 0,372 |
| | | | | | | |
| **Overall** | **3,5979** | | **3,8172** | | **-0,2193** | **0,296** |

\* The difference is statistically significant if P<0,05.

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**Table 5.32: Importance of HRM tasks of school principals in the Xhariep Education District compared with those of respondents in the Thabo Mofutsanyana Education District**

| HRM tasks of school principals | Xhariep (N = 21) | | Thabo Mofutsanyana (N = 79) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 4,7619 | 2 | 4,5570 | 6 | 0,2049 | 0,269 |
| | | | | | | |
| 2. Career planning of staff | 4,2381 | 9 | 4,5831 | 4 | -0,3442 | 0,025 * |
| | | | | | | |
| 3. Training and development of staff | 4,7619 | 2 | 4,6835 | 2 | 0,0784 | 0,558 |
| | | | | | | |
| 4. Disciplinary aspects | 4,8095 | 1 | 4,6456 | 3 | 0,1640 | 0,269 |
| | | | | | | |
| 5. Health and safety management | 4,4286 | 6 | 4,5443 | 7 | -0,1157 | 0,487 |
| | | | | | | |
| 6. PA for non-educators | 4,4286 | 6 | 4,5190 | 9 | -0,0904 | 0,570 |
| | | | | | | |
| 7. DAS for educators | 4,4286 | 6 | 4,5443 | 7 | -0,1157 | 0,477 |
| | | | | | | |
| 8. HR Administration | 4,6190 | 5 | 4,5696 | 5 | 0,0494 | 0,727 |
| | | | | | | |
| 9. Motivational techniques | 4,6667 | 4 | 4,7722 | 1 | -0,1055 | 0,444 |
| | | | | | | |
| **Overall** | **4,5714** | | **4,6020** | | **-0,0305** | **0,753** |

\* The difference is statistically significant if P<0,05.

The greater importance that respondents in the Thabo Mofutsanyana Education District place on five of the nine HRM tasks is not statistically significant with reference to the mean scores regarding the importance of HRM tasks, and neither are the differences in mean scores for the greater importance that Xhariep Education District's respondents place on the other four HRM tasks.

## 5.5.4 Training needs of school principals and the importance of HRM tasks of school principals compared between the Xhariep Education District and the Northern Free State Education District

### 5.5.4.1 Training needs of school principals compared between respondents in the Xhariep Education District and the Northern Free State Education District

A comparison with regard to training needs of school principals between respondents in the Xhariep Education District and the Northern Free State Education District is shown in Table 5.33. Between these two education districts it is clear that respondents in both express a need for training (mean > 3), in all aspects except for shortlisting and interviews (mean < 3). Xhariep Education District has greater overall training needs (mean = 3,5979), but this is too close to the mean from the Northern Free State Education District (mean = 3,4367) to indicate a statistically significant difference with reference to the mean scores regarding training needs.

The same applies in the case of each of the HRM tasks, except for shortlisting and interviews, where the difference according to the mean scores between the education districts is statistically significant.

Except for two HRM tasks, respondents in the Xhariep Education District have slightly greater training needs than respondents in the Northern Free State Education District.

### 5.5.4.2 Importance of HRM tasks of school principals compared between respondents in the Xhariep Education District and the Northern Free State Education District

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**Table 5.33:** **Training needs of respondents in the Xhariep Education District compared with those of respondents in the Northern Free State Education District**

| HRM tasks of school principals | Xhariep (N = 21) | | Northern Free State (N = 43) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,8571 | 9 | 2,2093 | 9 | 0,6478 | 0,047 * |
| | | | | | | |
| 2. Career planning of staff | 3,8095 | 3 | 3,5814 | 5 | 0,2281 | 0,469 |
| | | | | | | |
| 3. Training and development of staff | 3,8095 | 3 | 3,6744 | 4 | 0,1351 | 0,631 |
| | | | | | | |
| 4. Disciplinary aspects | 3,0476 | 8 | 3,3488 | 8 | -0,3012 | 0,319 |
| | | | | | | |
| 5. Health and safety management | 3,9048 | 2 | 3,8140 | 1 | 0,0908 | 0,731 |
| | | | | | | |
| 6. PA for non-educators | 3,5238 | 7 | 3,6512 | 3 | -0,1274 | 0,691 |
| | | | | | | |
| 7. DAS for educators | 3,6667 | 6 | 3,4884 | 6 | 0,1783 | 0,575 |
| | | | | | | |
| 8. HR Administration | 3,9524 | 1 | 3,4186 | 7 | 0,5338 | 0,093 |
| | | | | | | |
| 9. Motivational techniques | 3,8095 | 3 | 3,7442 | 2 | 0,0653 | 0,825 |
| | | | | | | |
| **Overall** | **3,5979** | | **3,4367** | | **0,1612** | **0,450** |

* The difference is statistically significant if P<0,05.

A comparison with regard to the importance of HRM tasks of school principals between respondents in the Xhariep Education District and the Northern Free State Education District is shown in Table 5.34. Both education districts assign great importance to all HRM tasks (mean > 3), and the higher importance that Xhariep Education District assigns (mean = 4,5714) does not leave enough difference according to the overall mean scores regarding the importance of HRM tasks of school principals from the Northern Free State's view of HRM tasks (mean = 4,4289) for this to be statistically significant.

Respondents in the Xhariep Education District place a nominally greater importance on all HRM tasks, except for the career planning of staff, to which respondents in the Northern Free State assign more value. This is, however, not statistically significant according to the mean scores in Table 5.34.

## 5.5.5 Training needs of school principals and the importance of HRM tasks of school principals compared between the Motheo Education District and the Lejweleputswa Education District

### 5.5.5.1 Training needs of school principals compared between respondents from the Motheo Education District and respondents from the Lejweleputswa Education District

Table 5.35 shows a comparison between the training needs of respondents in the Motheo Education District and respondents from the Lejweleputswa Education District. Respondents from both the Motheo Education District (mean for training needs = 3,7014) and the Lejweleputswa Education District (mean for training needs = 3,5887) have definite training needs in all HRM tasks (mean > 3) except for shortlisting and interviews (mean < 3) for which no training is required. The difference between the two education districts, in terms of overall mean scores regarding training needs is not statistically significant.

**Table 5.34:** **Importance of HRM tasks of school principals in the Xhariep Education District compared with those of respondents in the Northern Free State Education District**

| HRM tasks of school principals | Xhariep (N = 21) | | Northern Free State (N = 43) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 4,7619 | 2 | 4,5581 | 2 | 0,2038 | 0,347 |
| | | | | | | |
| 2. Career planning of staff | 4,2381 | 9 | 4,4186 | 5 | -0,1805 | 0,415 |
| | | | | | | |
| 3. Training and development of staff | 4,7619 | 2 | 4,5581 | 2 | 0,2038 | 0,263 |
| | | | | | | |
| 4. Disciplinary aspects | 4,8095 | 1 | 4,6047 | 1 | 0,2049 | 0,235 |
| | | | | | | |
| 5. Health and safety management | 4,4286 | 6 | 4,4186 | 5 | 0,0100 | 0,960 |
| | | | | | | |
| 6. PA for non-educators | 4,4286 | 6 | 4,2326 | 8 | 0,1960 | 0,453 |
| | | | | | | |
| 7. DAS for educators | 4,4286 | 6 | 4,2326 | 8 | 0,1960 | 0,445 |
| | | | | | | |
| 8. HR Administration | 4,6190 | 5 | 4,3488 | 7 | 0,2702 | 0,167 |
| | | | | | | |
| 9. Motivational techniques | 4,6667 | 4 | 4,4884 | 4 | 0,1783 | 0,365 |
| | | | | | | |
| **Overall** | **4,5714** | | **4,4289** | | **0,1425** | **0,396** |

\* The difference is statistically significant if P<0,05.

**Table 5.35: Training needs of respondents in the Motheo Education District compared with those of respondents in the Lejweleputswa Education District**

| HRM tasks of school principals | Motheo (N = 80) | | Lejweleputswa (N = 57) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| 1. Shortlisting and interviews | 2,8000 | 9 | 2,6667 | 9 | 0,1333 | 0,595 |
| 2. Career planning of staff | 3,8750 | 3 | 3,6140 | 7 | 0,2610 | 0,192 |
| 3. Training and development of staff | 3,8625 | 4 | 3,7193 | 6 | 0,1432 | 0,467 |
| 4. Disciplinary aspects | 3,5625 | 8 | 3,3158 | 8 | 0,2467 | 0,267 |
| 5. Health and safety management | 3,8125 | 5 | 3,8070 | 2 | 0,0055 | 0,977 |
| 6. PA for non-educators | 3,7000 | 7 | 3,7368 | 5 | -0,0368 | 0,864 |
| 7. DAS for educators | 4,0125 | 1 | 3,8070 | 2 | 0,2055 | 0,290 |
| 8. HR Administration | 3,7875 | 6 | 3,7544 | 4 | 0,0331 | 0,872 |
| 9. Motivational techniques | 3,9000 | 2 | 3,8772 | 1 | 0,0228 | 0,911 |
| **Overall** | **3,7014** | | **3,5887** | | **0,1127** | **0,491** |

* The difference is statistically significant if P<0,05.

Except for PA for non-educators, respondents in the Motheo Education District have a fractionally greater need for training in all the other HRM tasks than respondents in the Lejweleputswa Education District, but the differences according to the mean scores regarding the importance of HRM tasks of school principals are not statistically significant.

**5.5.5.2 Importance of HRM tasks of school principals compared between respondents from the Motheo Education District and respondents from the Lejweleputswa Education District**

Table 5.36 shows a comparison between the importance of HRM tasks of school principals of respondents in the Motheo Education District and respondents from the Lejweleputswa Education District. Both education districts consider HRM tasks very important (mean > 3), with the barely higher overall importance placed on the tasks by Motheo Education District (mean = 4,4667) not statistically significant according to the overall mean scores (mean = 4,4581) compared with the Lejweleputswa Education District.

There is also no statistical significance with reference to the mean scores of the importance of HRM tasks of school principals in the fact that respondents from Lejweleputswa Education District see six of the HRM tasks as more important than respondents from Motheo Education District, and the same goes for the three tasks that respondents from Motheo Education District see as more important.

**5.5.6 Training needs of school principals and the importance of HRM tasks of school principals compared between the Motheo Education District and the Thabo Mofutsanyana Education District**

**5.5.6.1 Training needs of school principals compared between respondents from the Motheo Education District and respondents from the Thabo Mofutsanyana Education District**

**Table 5.36: Importance of HRM tasks of school principals in the Motheo Education District compared with those of respondents in the Lejweleputswa Education District**

| HRM tasks of school principals | Motheo (N = 80) | | Lejweleputswa (N = 57) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 4,4875 | 4 | 4,5088 | 5 | -0,0213 | 0,878 |
| | | | | | | |
| 2. Career planning of staff | 4,3500 | 8 | 4,2105 | 9 | 0,1395 | 0,360 |
| | | | | | | |
| 3. Training and development of staff | 4,6000 | 1 | 4,6491 | 2 | -0,491 | 0,643 |
| | | | | | | |
| 4. Disciplinary aspects | 4,5375 | 3 | 4,5965 | 3 | -0,0590 | 0,597 |
| | | | | | | |
| 5. Health and safety management | 4,4000 | 7 | 4,4035 | 6 | -0,0035 | 0,980 |
| | | | | | | |
| 6. PA for non-educators | 4,3375 | 9 | 4,3158 | 7 | 0,0217 | 0,892 |
| | | | | | | |
| 7. DAS for educators | 4,4375 | 6 | 4,2281 | 8 | 0,2094 | 0,190 |
| | | | | | | |
| 8. HR Administration | 4,4500 | 5 | 4,5263 | 4 | -0,0763 | 0,578 |
| | | | | | | |
| 9. Motivational techniques | 4,6000 | 1 | 4,6842 | 1 | -0,0842 | 0,480 |
| | | | | | | |
| **Overall** | **4,4667** | | **4,4581** | | **0,0086** | **0,933** |

* The difference is statistically significant if P<0,05.

In Table 5.37 training needs of respondents in the Motheo Education District is compared with training needs from respondents from the Thabo Mofutsanyana Education District. Once again, the greater need for training that Thabo Mofutsanyana Education District's respondents exhibit (mean = 3,8172) above respondents in the Motheo Education District (mean = 3,7014) is not statistically significant according to the overall mean scores regarding training needs. Apart from shortlisting and interviews (mean < 3), both sub-groups of respondents have definite training needs (mean > 3).

Respondents in the Thabo Mofutsanyana Education District have greater training needs in all HRM tasks, except with regard to DAS for educators where respondents in the Motheo Education District have greater training needs. These differences are not statistically significant with reference to the mean scores regarding training needs of respondents.

**5.5.6.2   Importance of HRM tasks of school principals compared between respondents from the Motheo Education District and respondents from the Thabo Mofutsanyana Education District**

In Table 5.38 the importance of HRM tasks of school principals is compared between the Motheo Education District and the Thabo Mofutsanyana Education District. A marginally higher mean score for the importance respondents place on HRM tasks can be observed among the respondents in Thabo Mofutsanyana Education District (mean = 4,6020), compared to respondents of the Motheo District (mean = 4,4667), but this difference is not of statistical significance according to the overall mean scores. Both sub-groups value HRM tasks highly (mean > 3).

Respondents in the Thabo Mofutsanyana Education District place greater value on all HRM tasks than respondents in the Motheo Education District, with the only statistically significant difference according to the mean scores regarding the importance of HRM tasks of school principals in the career planning of staff.

**Table 5.37: Training needs of respondents in the Motheo Education District compared with those of respondents in the Thabo Mofutsanyana Education District**

| HRM tasks of school principals | Motheo (N = 80) | | Thabo Mofutsanyana (N = 79) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,8000 | 9 | 2,8987 | 9 | -0,0987 | 0,657 |
| | | | | | | |
| 2. Career planning of staff | 3,8750 | 3 | 4,0253 | 2 | -0,1503 | 0,365 |
| | | | | | | |
| 3. Training and development of staff | 3,8625 | 4 | 4,0127 | 3 | -0,1502 | 0,362 |
| | | | | | | |
| 4. Disciplinary aspects | 3,5625 | 8 | 3,6203 | 8 | -0,0578 | 0,773 |
| | | | | | | |
| 5. Health and safety management | 3,8125 | 5 | 3,9620 | 4 | -0,1495 | 0,399 |
| | | | | | | |
| 6. PA for non-educators | 3,7000 | 7 | 3,9367 | 6 | -0,2367 | 0,217 |
| | | | | | | |
| 7. DAS for educators | 4,0125 | 1 | 3,9620 | 4 | 0,0505 | 0,787 |
| | | | | | | |
| 8. HR Administration | 3,7875 | 6 | 3,8734 | 7 | -0,0859 | 0,639 |
| | | | | | | |
| 9. Motivational techniques | 3,9000 | 2 | 4,0633 | 1 | -0,1633 | 0,368 |
| | | | | | | |
| **Overall** | **3,7014** | | **3,8172** | | **-0,1158** | **0,418** |

* The difference is statistically significant if P<0,05.

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**Table 5.38: Importance of HRM tasks of school principals in the Motheo Education District compared with those of respondents in the Thabo Mofutsanyana Education District**

| HRM tasks of school principals | Motheo (N = 80) | | Thabo Mofutsanyana (N = 79) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 4,4875 | 4 | 4,5570 | 6 | -0,0695 | 0,583 |
| | | | | | | |
| 2. Career planning of staff | 4,3500 | 8 | 4,5823 | 4 | -0,2323 | 0,034 * |
| | | | | | | |
| 3. Training and development of staff | 4,6000 | 1 | 4,6835 | 2 | -0,0835 | 0,334 |
| | | | | | | |
| 4. Disciplinary aspects | 4,5375 | 3 | 4,6456 | 3 | -0,1081 | 0,272 |
| | | | | | | |
| 5. Health and safety management | 4,4000 | 7 | 4,5443 | 7 | -0,1443 | 0,195 |
| | | | | | | |
| 6. PA for non-educators | 4,3375 | 9 | 4,5190 | 9 | -0,1815 | 0,136 |
| | | | | | | |
| 7. DAS for educators | 4,4375 | 6 | 4,5443 | 7 | -0,1068 | 0,357 |
| | | | | | | |
| 8. HR Administration | 4,4500 | 5 | 4,5696 | 5 | -0,1196 | 0,277 |
| | | | | | | |
| 9. Motivational techniques | 4,6000 | 1 | 4,7722 | 1 | -0,1722 | 0,079 |
| | | | | | | |
| **Overall** | **4,4667** | | **4,6020** | | **-0,1358** | **0,060** |

\* The difference is statistically significant if P<0,05.

### 5.5.7 Training needs of school principals and the importance of HRM tasks of school principals compared between respondents from the Motheo Education District and the Northern Free State Education District

#### 5.5.7.1 Training needs of school principals compared between respondents from the Motheo Education District and respondents from the Northern Free State Education District

Training needs of respondents are compared in Table 5.39 between the Motheo Education District and the Northern Free State Education District. Respondents in Motheo Education District's greater overall need for training (mean = 3,7014) than the need expressed by respondents from the Northern Free State Education District (mean = 3,4367) is not statistically significant according to the overall mean scores. Excluding shortlisting and interviews (mean < 3), in which both groups of respondents do not desire training, the respondents want training in all other HRM tasks (mean > 3).

Respondents in the Motheo Education District have a slightly greater training need than respondents in the Northern Free State with regard to all HRM tasks, except for health and safety management. According to the mean scores regarding training needs, none of the differences are statistically significant, except in the case of shortlisting and interviews and DAS for educators.

#### 5.5.7.2 Importance of HRM tasks of school principals compared between respondents from the Motheo Education District and respondents from the Northern Free State Education District

The importance of HRM tasks of respondents is compared in Table 5.40 between the Motheo Education District and the Northern Free State Education District. Both groups of respondents perceive HRM tasks as very important (mean > 3), with Motheo Education District's respondents assigning a smidgeon more overall importance (mean = 4,4667) than the Northern Free State Education District (mean = 4,4289). These differences in the mean scores regarding the importance of HRM tasks of school principals are not statistically significant.

**Table 5.39:** **Training needs of respondents in the Motheo Education District compared with those of respondents in the Northern Free State Education District**

| HRM tasks of school principals | Motheo (N = 80) | | Northern Free State (N = 43) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,8000 | 9 | 2,2093 | 9 | 0,5907 | 0,021 * |
| | | | | | | |
| 2. Career planning of staff | 3,8750 | 3 | 3,5814 | 5 | 0,2936 | 0,162 |
| | | | | | | |
| 3. Training and development of staff | 3,8625 | 4 | 3,6744 | 3 | 0,1881 | 0,378 |
| | | | | | | |
| 4. Disciplinary aspects | 3,5625 | 8 | 3,3488 | 8 | 0,2137 | 0,355 |
| | | | | | | |
| 5. Health and safety management | 3,8125 | 5 | 3,8140 | 1 | -0,0015 | 0,994 |
| | | | | | | |
| 6. PA for non-educators | 3,7000 | 7 | 3,6512 | 4 | 0,0488 | 0,831 |
| | | | | | | |
| 7. DAS for educators | 4,0125 | 1 | 3,4884 | 6 | 0,5241 | 0,017 * |
| | | | | | | |
| 8. HR Administration | 3,7875 | 6 | 3,4186 | 7 | 0,3689 | 0,106 |
| | | | | | | |
| 9. Motivational techniques | 3,9000 | 2 | 3,7442 | 2 | 0,1558 | 0,460 |
| | | | | | | |
| **Overall** | **3,7014** | | **3,4367** | | **0,2647** | **0,117** |

* The difference is statistically significant if P<0,05.

**Table 5.40: Importance of HRM tasks of the school principal in the Motheo Education District compared with those of respondents in the Northern Free State Education District**

| HRM tasks of school principals | Motheo (N = 80) | | Northern Free State (N = 57) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| 1. Shortlisting and interviews | 4,4875 | 4 | 4,5581 | 2 | -0,0706 | 0,656 |
| 2. Career planning of staff | 4,3500 | 8 | 4,4186 | 5 | -0,0686 | 0,654 |
| 3. Training and development of staff | 4,6000 | 1 | 4,5581 | 2 | 0,0419 | 0,720 |
| 4. Disciplinary aspects | 4,5375 | 3 | 4,6047 | 1 | -0,0672 | 0,582 |
| 5. Health and safety management | 4,4000 | 7 | 4,4186 | 5 | -0,0186 | 0,894 |
| 6. PA for non-educators | 4,3375 | 9 | 4,2326 | 8 | 0,1049 | 0,561 |
| 7. DAS for educators | 4,4375 | 6 | 4,2326 | 8 | 0,2049 | 0,229 |
| 8. HR Administration | 4,4500 | 5 | 4,3488 | 7 | 0,1012 | 0,500 |
| 9. Motivational techniques | 4,6000 | 1 | 4,4884 | 4 | 0,1116 | 0,411 |
| **Overall** | **4,4667** | | **4,4289** | | **0,0377** | **0,732** |

* The difference is statistically significant if P<0,05.

The five HRM tasks that Motheo Education District and the four to which Northern Free State Education District assign greater importance do not differ enough to be statistically significant, according to the mean scores of the importance of HRM tasks of school principals.

## 5.5.8 Training needs of school principals and the importance of HRM tasks of school principals compared between respondents from the Lejweleputswa Education District and the Thabo Mofutsanyana Education District

### 5.5.8.1 Training needs of school principals and the importance of HRM tasks of school principals compared between respondents from the Lejweleputswa Education District and the Thabo Mofutsanyana Education District

Table 5.41 shows the comparison between the responses from the Lejweleputswa Education District and the Thabo Mofutsanyana Education District regarding training needs of respondents. Once again, the difference in overall mean scores of training needs between the two education districts is not statistically significant. Respondents in the Thabo Mofutsanyana Education District show a slightly greater training need (mean = 3,8172), than respondents in the Lejweleputswa Education District (mean = 3,5887). Once again respondents indicate a need for training in all HRM tasks (mean > 3), except shortlisting and interviews (mean < 3). Respondents in the Thabo Mofutsanyana Education District have a greater need for training with regard to all HRM tasks, but not at a statistically significant level of difference, except in the case of career planning of staff where the difference is significant, according to the mean scores of the training needs.

### 5.5.8.2 Importance of HRM tasks of school principals compared between respondents from the Lejweleputswa Education District and the Thabo Mofutsanyana Education District

Table 5.42 shows the comparison between the responses from the Lejweleputswa Education District and the Thabo Mofutsanyana Education District regarding the importance of HRM tasks of school principals. Overall, respondents in the Thabo Mofutsanyana Education District perceive all HRM tasks as nominally more important

**Table 5.41: Training needs of respondents in the Lejweleputswa Education District compared with those of respondents in the Thabo Mofutsanyana Education District**

| HRM tasks of school principals | Lejweleputswa (N = 57) | | Thabo Mofutsanyana (N = 79) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,6667 | 9 | 2,8987 | 9 | -0,2321 | 0,350 |
| | | | | | | |
| 2. Career planning of staff | 3,6140 | 7 | 4,0253 | 2 | -0,4113 | 0,032 * |
| | | | | | | |
| 3. Training and development of staff | 3,7193 | 6 | 4,0127 | 3 | -0,2934 | 0,089 |
| | | | | | | |
| 4. Disciplinary aspects | 3,3158 | 8 | 3,6203 | 8 | -0,3045 | 0,169 |
| | | | | | | |
| 5. Health and safety management | 3,8070 | 2 | 3,9620 | 4 | -0,1550 | 0,460 |
| | | | | | | |
| 6. PA for non-educators | 3,7368 | 5 | 3,9367 | 6 | -0,1999 | 0,357 |
| | | | | | | |
| 7. DAS for educators | 3,8070 | 2 | 3,9620 | 4 | -0,1550 | 0,462 |
| | | | | | | |
| 8. HR Administration | 3,7544 | 4 | 3,8734 | 7 | -0,1190 | 0,563 |
| | | | | | | |
| 9. Motivational techniques | 3,8772 | 1 | 4,0633 | 1 | -0,1861 | 0,358 |
| | | | | | | |
| **Overall** | **3,5887** | | **3,8172** | | **-0,2285** | **0,157** |

\* The difference is statistically significant if P<0,05.

**Table 5.42:** **Importance of HRM tasks of the school principal in the Lejweleputswa Education District compared with those of respondents in the Thabo Mofutsanyana Education District**

| HRM tasks of school principals | Lejweleputswa (N = 57) | | Thabo Mofutsanyana (N = 79) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| 1. Shortlisting and interviews | 4,5088 | 5 | 4,5570 | 6 | -0,0482 | 0,729 |
| 2. Career planning of staff | 4,2105 | 9 | 4,5823 | 4 | -0,3718 | 0,007 * |
| 3. Training and development of staff | 4,6491 | 2 | 4,6835 | 2 | -0,0344 | 0,756 |
| 4. Disciplinary aspects | 4,5965 | 3 | 4,6456 | 3 | -0,0491 | 0,673 |
| 5. Health and safety management | 4,4035 | 6 | 4,5443 | 7 | -0,1408 | 0,323 |
| 6. PA for non-educators | 4,3158 | 7 | 4,5190 | 9 | -0,2032 | 0,147 |
| 7. DAS for educators | 4,2281 | 8 | 4,5443 | 7 | -0,3162 | 0,039 * |
| 8. HR Administration | 4,5263 | 4 | 4,5696 | 5 | -0,0433 | 0,718 |
| 9. Motivational techniques | 4,6842 | 1 | 4,7722 | 1 | -0,0879 | 0,419 |
| **Overall** | **4,4581** | | **4,6020** | | **-0,1439** | **0,130** |

\* The difference is statistically significant if P<0,05.

than (mean = 4,6020) respondents in the Lejweleputswa Education District do (mean = 4,4581), but these differences are not statistically significant, when the overall mean scores regarding the importance of HRM tasks of school principals are compared.

Respondents in the Thabo Mofutsanyana Education District see all HRM tasks as more important than respondents in the Lejweleputswa Education District. The differences are not statistically significant, except for career planning of staff and DAS for educators where the difference is statistically significant, when the mean scores for the importance of HRM tasks of school principals are compared.

## 5.5.9  Training needs of school principals and the importance of HRM tasks of school principals compared between respondents from the Lejweleputswa Education District and the Northern Free State Education District

**5.5.9.1  Training needs of school principals compared between respondents from the Lejweleputswa Education District and respondents from the Northern Free State Education District**

Training needs compared between respondents from the Lejweleputswa Education District and the Northern Free State Education District are shown in Table 5.43. Respondents in the Lejweleputswa Education District (mean = 3,5887), show a greater overall training need than the respondents in the Northern Free State Education District (mean = 3,4367), with the difference according to the overall mean scores being statistically insignificant. Both groups show a definite need for training in all HRM tasks (mean > 3) except for shortlisting and interviews (mean < 3).

Respondents in the Lejweleputswa Education District have a greater training need with respect to six HRM tasks, without this difference according to the mean scores being statistically significant. The same goes for the three tasks which respondents in the Northern Free State consider more important in terms of training needs.

**5.5.9.2  Importance of HRM tasks of school principals compared between respondents from the Lejweleputswa Education District and respondents from the Northern Free State Education District**

**Table 5.43: Training needs of respondents in the Lejweleputswa Education District compared with those of respondents in the Northern Free State Education District**

| HRM tasks of school principals | Lejweleputswa (N = 57) | | Northern Free State (N = 43) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,6667 | 9 | 2,2093 | 9 | 0,4574 | 0,098 |
| | | | | | | |
| 2. Career planning of staff | 3,6140 | 7 | 3,5814 | 5 | 0,0326 | 0,891 |
| | | | | | | |
| 3. Training and development of staff | 3,7193 | 6 | 3,6744 | 3 | 0,0449 | 0,838 |
| | | | | | | |
| 4. Disciplinary aspects | 3,3158 | 8 | 3,3488 | 8 | -0,0330 | 0,893 |
| | | | | | | |
| 5. Health and safety management | 3,8070 | 2 | 3,8140 | 1 | -0,0069 | 0,976 |
| | | | | | | |
| 6. PA for non-educators | 3,7368 | 5 | 3,6512 | 4 | 0,0857 | 0,738 |
| | | | | | | |
| 7. DAS for educators | 3,8070 | 2 | 3,4884 | 6 | 0,3186 | 0,186 |
| | | | | | | |
| 8. HR Administration | 3,7544 | 4 | 3,4186 | 7 | 0,3358 | 0,186 |
| | | | | | | |
| 9. Motivational techniques | 3,8772 | 1 | 3,7442 | 2 | 0,1330 | 0,563 |
| | | | | | | |
| **Overall** | **3,5887** | | **3,4367** | | **0,1520** | **0,415** |

* The difference is statistically significant if P<0,05.

The importance of HRM tasks of school principals compared between the Lejweleputswa Education District and the Northern Free State Education District are shown in Table 5.44. Although respondents in the Lejweleputswa Education District place greater priority overall on the listed HRM tasks (mean = 4,4581), both groups (Northern Free State Education District (mean = 4,4289) have a high regard for all of these tasks (mean > 3) and the difference according to the overall mean scores with regard to the importance of HRM tasks of school principals is not statistically significant.

Respondents in the Northern Free State Education District place greater importance on seven HRM tasks, but these differences are not statistically significant according to the mean scores. The same applies to the two tasks which Lejweleputswa Education District's respondents consider to be of greater importance.

## 5.5.10 Training needs of school principals and the importance of HRM tasks of school principals compared between respondents from the Thabo Mofutsanyana Education District and the Northern Free State Education District

### 5.5.10.1 Training needs of school principals compared between respondents from the Thabo Mofutsanyana Education District and respondents from the Northern Free State Education District

Table 5.45 shows the comparison between the training needs of respondents of the Thabo Mofutsanyana Education District and respondents from the Northern Free State Education District. Respondents in the Thabo Mofutsanyana Education District's greater overall need for training (mean = 3,8172) than the need expressed by respondents from the Northern Free State Education District (mean = 3,4367) is statistically significant, with the difference in the overall mean scores taken into account. Excluding shortlisting and interviews, in which both groups of respondents do not desire training (mean < 3), the respondents want training in all HRM tasks (mean > 3).

**Table 5.44: Importance of HRM tasks of the school principals in the Lejweleputswa Education District compared with those of respondents in the Northern Free State Education District**

| HRM tasks of school principals | Lejweleputswa (N = 57) | | Northern Free State (N = 43) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| 1. Shortlisting and interviews | 4,5088 | 5 | 4,5581 | 2 | -0,0494 | 0,774 |
| 2. Career planning of staff | 4,2105 | 9 | 4,4186 | 5 | -0,2081 | 0,274 |
| 3. Training and development of staff | 4,6491 | 2 | 4,5581 | 2 | 0,0910 | 0,544 |
| 4. Disciplinary aspects | 4,5965 | 3 | 4,6047 | 1 | -0,0082 | 0,955 |
| 5. Health and safety management | 4,4035 | 6 | 4,4186 | 5 | -0,0151 | 0,933 |
| 6. PA for non-educators | 4,3158 | 8 | 4,2326 | 8 | 0,0832 | 0,690 |
| 7. DAS for educators | 4,2281 | 6 | 4,2326 | 8 | -0,0045 | 0,984 |
| 8. HR Administration | 4,5263 | 4 | 4,3488 | 7 | 0,1775 | 0,279 |
| 9. Motivational techniques | 4,6842 | 1 | 4,4884 | 4 | 0,1958 | 0,199 |
| **Overall** | **4,4581** | | **4,4289** | | **0,0291** | **0,838** |

* The difference is statistically significant if P<0,05.

**Table 5.45: Training needs of respondents in the Thabo Mofutsanyana Education District compared with those of respondents in the Northern Free State Education District**

| HRM tasks of school principals | Thabo Mofutsanyana (N = 79) | | Northern Free State (N = 43) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 2,8987 | 9 | 2,2093 | 9 | 0,6894 | 0,006 * |
| | | | | | | |
| 2. Career planning of staff | 4,0253 | 2 | 3,5814 | 5 | 0,4439 | 0,025 * |
| | | | | | | |
| 3. Training and development of staff | 4,0127 | 3 | 3,6744 | 3 | 0,3382 | 0,065 |
| | | | | | | |
| 4. Disciplinary aspects | 3,6203 | 8 | 3,3488 | 8 | 0,2714 | 0,237 |
| | | | | | | |
| 5. Health and safety management | 3,9620 | 4 | 3,8140 | 1 | 0,1481 | 0,499 |
| | | | | | | |
| 6. PA for non-educators | 3,9367 | 6 | 3,6512 | 4 | 0,2855 | 0,219 |
| | | | | | | |
| 7. DAS for educators | 3,9620 | 4 | 3,4884 | 6 | 0,4737 | 0,048 * |
| | | | | | | |
| 8. HR Administration | 3,8734 | 7 | 3,4186 | 7 | 0,4548 | 0,047 * |
| | | | | | | |
| 9. Motivational techniques | 4,0633 | 1 | 3,7442 | 2 | 0,3191 | 0,125 |
| | | | | | | |
| **Overall** | **3,8172** | | **3,4367** | | **0,3805** | **0,022 *** |

* The difference is statistically significant if P<0,05.

Respondents in the Thabo Mofutsanyana Education District have greater training needs in all the listed HRM tasks than respondents in the Northern Free State Education District. The differences in five HRM tasks are not statistically significant, but with respect to shortlisting and interviews, career planning of staff, DAS for educators and HR administration there are indeed statistically significant differences, according to the difference in the mean scores.

**5.5.10.2 Importance of HRM tasks of school principals compared between respondents from the Thabo Mofutsanyana Education District and respondents from the Northern Free State Education District**

Table 5.46 shows the comparison of the importance of HRM tasks of school principals between respondents from the Thabo Mofutsanyana Education District and respondents from the Northern Free State Education District. Overall, respondents in the Thabo Mofutsanyana Education District give greater importance to HRM tasks (mean = 4,6020) than do respondents in the Northern Free State Education District (mean = 4,4289). This difference according to the overall mean scores is not, however, statistically significant, since both see all HRM tasks as important (mean > 3).

Respondents in the Thabo Mofutsanyana Education District regard all HRM tasks as more important than respondents in the Northern Free State Education District, except in the case of shortlisting and interviews. None of the differences, apart from motivational techniques, are statistically significant, according to the mean scores.

## 5.6 CONCLUSION

Respondents in the Free State Province indicated very clearly that they need training with regard to their HRM task, except for only one aspect namely shortlisting and interviews. All the various sub-groups and educational districts show great similarities with regard to their responses in reference to both training needs and the importance of HRM tasks. They are generally in agreement regarding the needs of training and also in regard to the importance of HRM tasks of school principals.

**Table 5.46:** **Importance of HRM tasks of school principals of respondents in the Thabo Mofutsanyana Education District compared with those of respondents in the Northern Free State Education District**

| HRM tasks of school principals | Thabo Mofutsanyana (N = 79) | | Northern Free State (N = 43) | | Difference of means | Significance (P)* |
|---|---|---|---|---|---|---|
| | Mean | Rank order | Mean | Rank order | | |
| | | | | | | |
| 1. Shortlisting and interviews | 4,5570 | 6 | 4,5581 | 2 | -0,0012 | 0,994 |
| | | | | | | |
| 2. Career planning of staff | 4,5823 | 4 | 4,4186 | 5 | 0,1637 | 0,207 |
| | | | | | | |
| 3. Training and development of staff | 4,6835 | 2 | 4,5581 | 2 | 0,1254 | 0,306 |
| | | | | | | |
| 4. Disciplinary aspects | 4,6456 | 3 | 4,6047 | 1 | 0,0409 | 0,749 |
| | | | | | | |
| 5. Health and safety management | 4,5443 | 7 | 4,4186 | 5 | 0,1257 | 0,380 |
| | | | | | | |
| 6. PA for non-educators | 4,5190 | 9 | 4,2326 | 8 | 0,2864 | 0,069 |
| | | | | | | |
| 7. DAS for educators | 4,5443 | 7 | 4,2326 | 8 | 0,3117 | 0,053 |
| | | | | | | |
| 8. HR Administration | 4,5696 | 5 | 4,3488 | 7 | 0,2208 | 0,088 |
| | | | | | | |
| 9. Motivational techniques | 4,7722 | 1 | 4,4884 | 4 | 0,2838 | 0,023 * |
| | | | | | | |
| **Overall** | **4,6020** | | **4,4289** | | **0,1730** | **0,090** |

* The difference is statistically significant if P<0,05.

HRM tasks of school principals are regarded as very important, indicated by the high mean scores.  Very significant, though, is that there is a definite lower response in training needs, compared to the importance of HRM tasks.

In the next chapter a contemporary HRM model for school principals based on the literature review (cf. Chapters 2 and 3) and the empirical research (cf. Chapters 4 and 5) will be recommended.

# CHAPTER 6

# A HUMAN RESOURCES MANAGEMENT MODEL FOR SCHOOL PRINCIPALS

## 6.1  INTRODUCTION

The recommended HRM model described in this chapter contains information obtained as follows:

- the literature study regarding HRM (cf. Chapter 2 and 3)

- empirical research (cf. Chapter 4 and 5)

- personal experience as school principal

- conversations with colleagues over the years

- interviews with experienced educators

This model will serve only as a framework of the HRM task of the school principal and will require adjustment according to personal circumstances. The model is structured according to the components of HRM as set out in Figure 2.3 (cf. 2.7).

## 6.2  HUMAN RESOURCES PROVISION (HRP)

HR Provision is a very important ingredient of HRM and even if the school principal is of the opinion that the HR aspects do not quite make up a part of a school principal's management task, the model will endeavour to prove the opposite.

### 6.2.1  HR planning

If a school has a school principal with a vision and an attunement for educational trends, it will eventually ensure that the staff constitution will make it possible for the school to reach set goals and success in regard to teaching and education.

It is recommended that school principals approach HRP in the following manner:

- Ensure that HRP in schools is done over the short and long term (cf. 2.8.1.2).

- Ensure that the correct number and type of people are employed at the right time and in the right position at the school (cf. 2.8.1.1).

- Focus should be placed on the different categories of staff when HRP is done (cf. 4.3.3.3).

- Know that HRP greatly influences the successful achievement of the goals of the school in regard to teaching and education (cf. 2.8.1.1).

- Understand that HRP forms the foundation in regard to HR provision in schools (cf. 2.8.1.1).

- Forming of a coordinated action regarding all management aspects within schools and HRP (cf. 2.8.12)

- All management aspects within schools and HRP must form a coordinated action (cf. 2.8.1.2).

- Be aware that a staff audit as part of HRP has a definite influence on the successful application of staff (cf. 2.8.1.2).

- Know that the successful management of change and HRP go hand in hand (cf. 2.8.1.2).

- Be aware of the influence of the following internal factors on HRP:
  - Goals of the organization
  - Organisational style
  - Nature of the task
  - Teamwork
  - Style and experience of leadership (cf. 2.8.1.4).

- Take into account that certain external factors have a definite influence on HRP in schools:
  - Union activity

➢ Government activity and requirements

➢ Economic conditions (cf. 2.8.1.4).

- Provide for HRP being influenced by HR forecasting, job analysis, job description, job specification and legal constraints (cf. Figure 2.6).

School principals must see HRP as an integral part of their HRM task, as it is not merely a Departmental function, but is greatly influences the achievement of the goals of the school in terms of education and training.

## 6.2.2  HR forecasting

The school principal has an important role to play in positioning the school in regard to changing educational circumstances. As far as HRM is concerned, it entails the management of educators and non-educators. The school principal must, therefore, be able to forecast and manage future trends specific to the school.

It is recommended that the school principal take the following into consideration in regard to HR forecasting:

- National and provincial mandates regarding HRM.
- National, provincial and school trends regarding learner numbers (cf. 2.8.2.3 & Figure 2.7).
- Training and availability of educators in the field of training and general field of work (cf. 2.8.2.4).
- Forecasting in regard to specific skills that will be needed at the school (cf. 2.8.2.1.).
- Decision-making concerning HR provision, for example the view of the FSDoE that cleaners and factotums (terrain staff) should be appointed and remunerated by SGB (Free State Department of Education 2003b:s.a.) and the decrease of hostel staff until no hostel staff will be on the payroll of the FSDoE in 2005/2006 (Free State Department of Education, 2002d:3).

In addition school principals should make use of the following aspects to assist them with HR forecasting:

- Career management of staff. This enables the school principal to determine staff's future work movements. Retirement dates, especially in regard to early retirement, can be determined. A healthy relationship with staff is of the utmost importance in this instance (cf. 2.8.12.1).

- Investigate retraining and redeployment of staff within the school (cf. 3.2.4).

- Versatility of all staff so that changing circumstances can be addressed. Versatility includes all categories of staff, as well as a wide variety of skills (cf. 3.2.3).

- Presenting bursaries to future students of education in order to make provision for the so-called scarce subjects (cf. 2.8.2.4). This could even be used for extramural activities.

The above-mentioned can also be extended to non-educators, as circumstances are changing with regard to Departmental policy regarding the supply of non-educator staff to schools and this must be taken into account through a process of HRP focused on non-educators as a staff component. The forecasting of HR as an integral part of HRP places the burden on the school principal to predict the labour market actively in order to ensure the realization of the goals of the school in terms of education and training by being able to supply the staff of the school according to all categories.

## 6.2.3   Job analysis

It is important to do a job analysis for each separate post, as each post has its own demands and characteristics and this necessitates a logical and systematic investigation into each specific post. The expected characteristics of a job occupant should also be described. The school principal can base all the above-mentioned in the job analysis on how the post functioned in the past, or how it should function in future in order to facilitate professional growth in the school (cf. 2.8.3.1).  For the purpose of this study, job analysis will be handled separately for educators and non-educators.

### 6.2.3.1  Educators

The purpose of this study is not to address the curricular division of work, as this study concentrates on HRM and not on academic management. Recommendations will be

made aiming at making the HRM task of the school principal more efficient, therefore eventually leading to the exclusive purpose of the school, namely effective learning.

The following recommendations are made regarding the job analysis of teaching posts:

- Without taking over the curricular division of work at the school, it is still necessary to undertake a complete job analysis for each teaching post, taking into consideration main academic components, extramural activities and management skills linked to the post (cf. 2.8.3.1).

- The school principal as HR manager, using job analysis of teaching posts, should consider the following in benefiting the promotion of the functioning of the post and school as a whole:

  ➢ job simplification: although this is more applicable to unskilled posts, certain teaching posts can be redefined to suit inexperienced or struggling staff in order to create space for further development (cf. 2.8.6.3);

  ➢ job enlargement: the addition of challenging tasks to the post in order to enlarge the importance of the post, if it is composed in such a way as to accommodate a specific person therein, or for purposes of development (cf. 2.8.6.3);

  ➢ job enrichment: the extension of posts by connecting such posts to more responsibilities and freedom because the post justifies this and because it can be used for further development of staff (cf. 2.8.6.3);

  ➢ job rotation: variation of specific tasks linked to the post without influencing the main academic components. This aspect may also be used to make educators more versatile and to promote development in educators (cf. 2.8.6.3).

Presently much pressure is placed on school principals to manage schools in the academic field with progressively fewer staff members. By managing job analysis as a scientific process in schools, the process of academic management can be facilitated by means of the merging of responsibilities and skills in regard to teaching posts.

### 6.2.3.2 Non-educators

Job analysis is of importance to this staff category because routine tasks are often done, but also because this staff category has a variety of tasks to perform. The administrative staff provide a possibly more professional service, whereas the tasks of the terrain staff and hostel staff are mostly of a routine nature.

The following may serve as recommendations in order to be able to complete the job analysis of non-educators:

- Distinguish amongst administrative, terrain and hostel staff, and also consider the role of the terrain manager and household supervisors (matrons) in doing the job analysis.

- All tasks connected to each individual post must be unraveled in order to get a picture of each post in its entirety so that the opportunity may be created for a complete job description (cf. 2.8.3.1).

- Take the demands and the specific characteristics of each post into consideration (cf. 2.8.3.1).

- All the various tasks of a specific staff category may even be thrown into a combined pool in order to get a complete overview of the total task to be completed by that category of staff, which greatly influences HR provision (cf. 2.8.3.1).

- Make use of job design and job redesign as well as job simplification, job enrichment, job enlargement and job rotation (cf. 2.8.6) in order to lessen the level of routine and repetition connected to tasks attached to various posts, and therefore ensuring variety and interest in the workplace.

### 6.2.3.3  Summarizing recommendations regarding job analysis

- Job analysis should never be done in isolation by the school principal without taking all role players into consideration. The acceptance of the process by all role players depends on the involvement of the various groups in the process (cf. 2.8.3.2).

- The creation of committees whose purpose would be the completion of the initial job analysis for different categories of staff should be considered if it has never before taken place at the school. Hereafter the job analysis could merely be revised.

- Proper representation on these committees should be ensured. The following may serve as guidelines:

  - Educators:  School principal
    Deputy principal(s)
    Head of Department(s)
    Post level 1 representation
    Union representation
    Member of SGB (optional)

  - Administrative staff:  School principal
    Deputy principal(s)
    Representative of administrative staff
    Union representation
    Member of SGB (optional)

  - Terrain staff:  School principal
    Deputy principal(s)
    Terrain manager
    Representative of cleaners
    Union representative
    Member of SGB (optional)

> ➤ Hostel staff:   School principal
>
> Deputy principal(s)
>
> Hostel warden
>
> Household Supervisor (matron)
>
> Representative of household aids
>
> Union representative
>
> Member of SGB (optional)

Job analysis plays an important role in the management of HR at any school. The challenges in terms of the staff provision and staff application can definitely be addressed by a scientifically managed job analysis across the whole employment spectrum of the school.

## 6.2.4  Job description

Job descriptions are necessary for all staff connected to a school. A distinction should be made between staff employed by the SGB and those employed by the FSDoE. Although staff members, including educators and non-educators, are in possession of official job descriptions, these job descriptions have to be extended in order to be adjusted to the unique circumstances of the school and the post as described by the job analysis (cf. 2.8.4.4).

The following are recommendations in regard to the constitution of job descriptions for staff:

- No reference should be made to a specific gender.
- Update job descriptions regularly.
- Write clearly, concisely and unambiguously.
- Performance standards and time limits should be described where applicable.
- It should be comprehensive and accurate.
- Involve and consult with the job holder in the constitution of the job description.
- Confirm job descriptions in writing after it had been compiled.
- Ensure that detail is entered into the job description.

- Compare the job description to legal prescriptions and contractual regulations only in regard to SGB appointments.
- Provide a copy to the employee and file the job description for future reference (Schultz, 2001a:207-208).

Appendix D can be used as an example to constitute a job description. Appendix D is a suggested example of a job description of a post level 1 educator. Job descriptions should be compiled for the following members of staff:

**(i) Teaching staff**
- Educator
- Head of Department
- Deputy principal
- School principal

**(ii) Non-educators**
- Administrative staff
- Terrain staff
- Hostel staff

It is furthermore recommended that a job description according to Appendix D is interpreted and used as follows:

**(i) Section A:  Job information summary**
- General information regarding the job and the incumbent

**(ii) Section B:  Job purpose**
- The job purpose should be an accurate and concise statement regarding the existence of the post.

**(iii) Section C:  Core duties and responsibilities of the job**
- Key areas that play an important role in the school.
- Departmental policy could be used to compile the core duties and responsibilities of the post.

- The why and what of the job is described by core duties and responsibilities and not the detailed how of the job.

### (iv) Section D:  Reporting structure

- A detailed reporting structure in various sections of school management should be described.

- A reporting structure gives job holders confidence in reporting, as well as the necessary information regarding reporting.

- Furthermore it indicates structures of authority within schools.

### (v) Section E:  Usage of specific equipment and material

- A complete description of specific equipment and material to be used is required.

- A description of training with regard to the use of equipment is essential.

- The storage of dangerous substances and the use thereof should also be described.

### (vi) Section F:  Personalized duty sheet

- A proper description of all tasks and responsibilities in different circumstances is essential.

- The biggest to the most insignificant task or responsibility should be described in detail.

- Leadership roles, for instance those of the chairperson of a committee, should be described in detail.

### (vii) Section G:  Agreement

- Both the job holder as well as the school principal or immediate supervisor should verify the job description as correct and complete (cf. 2.8.4.4).

To conclude, it is recommended that school principals whose schools have the necessary computer facilities should make a template that will enable staff with the needed computer skills to compile their job descriptions on computer for discussion with the school principal.

## 6.2.5  Legal constraints

The complexity of the HRM task of the school principal is further complicated by the legal aspects that should be considered when HRM decisions are taken. It is recommended that school principals keep up to date regarding the following aspects:

- The influence, functioning and application of affirmative action in the HRM of schools (cf. 2.8.7.1).

- The following legislation greatly influences HRM:
  - The South African Constitution Act, 108 of 1996
  - Labour Relations Act, 66 of 1995 as amended
  - Basic conditions of Employment Act, No. 75 of 1997 as amended
  - Employment Equity Act, 55 of 1998
  - Unemployment Insurance Act, 30 of 1996
  - Occupational Injuries and Diseases Act, 130 of 1993
  - Occupational Health and Safety Act, 85 of 1993
  - Skills Development Act, 55 of 1998 (cf. 2.8.7.2).

- Proper training of school principals and SGB's to be able to manage this influential legislation in such a way that the correct labour procedures will be followed.

## 6.2.6  Summary

HRP is a very important HRM task of the school principal and care should be taken that this aspect is not undervalued or approached in a less than professional and scientific manner. If it is undertaken once in its entirety, then it need only be updated thereafter. Changing circumstances in education will place the burden on the school principal to facilitate the process of HRP as an HRM task even more.

## 6.2.7  Recruitment

The recruitment of staff of all categories is an important process to be completed in order to be able to contribute to learner progress and achievement (cf. 2.8.8.2).  In the present educational dispensation the recruitment process plays a far more important role as a result of SGB appointments in schools (cf. 2.8.8.5), with the school principal inevitably having to facilitate this process.  The whole recruitment process in regard to

Departmental posts is also largely being influenced by policy and applicable legislation including aspects like redeployment, Departmental provision of post level 1 educators, moratoriums on appointments and actions taken regarding non-educator posts which fall under the Civil Service Act (cf. 2.8.8.1).

The school principal must, however, never lose sight of the fact that the image of the school will determine the recruitment of suitable candidates for either Departmental or SGB posts. This can have a definite impact on the eventual recruitment campaign in regard to the finding of the suitable person for a specific vacancy. Hereby any school can obtain a competitive advantage over other schools (cf. 2.8.8.2).

The following guidelines in regard to recruitment are recommended to be applied by school principals:

**6.2.7.1  Advertisements**
- The school principal in co-operation with the SGB must ensure that advertisements for vacancies are placed widely enough so that no one could complain that they were excluded from the process (cf. 2.8.8.5).

- Re-advertise Departmental posts that had appeared in the vacancy list, thereby ensuring that a wider basis of applicants can be compiled. This leads to greater awareness of potential candidates who did not receive the vacancy list on time, or at all (cf. 4.3.17).

- The advertisement (specifically for SGB posts) must be done very thoroughly, so that it can link with the RJP in terms of the informing of potential applicants in regard to all facets of the post (cf. 2.8.8.3).

- It is furthermore recommended that the following aspects appear in the advertisement regarding SGB posts:
  - Name of the post
  - Reference number
  - Contact person for further inquiries
  - Contact details of the school
  - Application process (if any)

- ➢ Documentation that must be included
- ➢ Indication that the school will be the employer
- ➢ Remuneration package, as well as benefits (optional)
- ➢ Post description (tasks and/or specific skills)
- ➢ Indication if application may be done by e-mail or fax

- • In the case of an advertisement regarding a vacancy that appeared in a Departmental vacancy list:
  - ➢ Description of the post as it appears in the vacancy list
  - ➢ Mention number of the vacancy list
  - ➢ Where it is available
  - ➢ Closing date for applications
  - ➢ Mention that it is to be done according to Departmental prescriptions
  - ➢ Contact person for further inquiries
  - ➢ Contact details of the school

## 6.2.7.2 Walk-ins

Some school principals are regularly visited by educators, but also other categories of staff, who wish to deliver their curricula vitae at the school (cf. 2.8.8.5). This is a more important source of recruitment than is generally realised.

The personal reception of these people is of great importance, as it may be viewed as a first interview and at the same time the meeting must build on the image of the school by handling the meeting in a professional manner (cf. 2.8.8.5(b)).

Appendix E serves as a guideline on how to administrate such curricula vitae so that it can serve as a source of recruitment and contribute to the proper staff provision of the school. Appendix E is specifically aimed at educators, but the format can be adjusted to be used for other categories of staff. The addendum would then be attached to the curriculum vitae and afterwards filed.

## 6.2.7.3 Write-ins

Write-ins are also an important source of recruitment, but is not such a general occurrence as walk-ins (cf. 2.8.8.5(b)). Appendix E should also be used for write-ins and the administration can take place in a similar fashion.

**6.2.7.4 Unions**

Unions should play an important role by collecting information regarding available staff, staff that are moving to a specific area, cross transfers and students who have completed their studies. This can serve as an important source of recruitment (cf. 2.8.8.5(a)).

**6.2.7.5 Other sources of recruitment**

It is recommended that school principals also explore the following sources of recruitment:

- Job posting and job bidding
- Skills inventories
- Recalls from layoff
- Informal search
- Employee referrals
- Temporary worker pools
- Employment agencies
- Educational recruiting
- Professional associations
- General sources (cf. 2.8.8.5(c)).

The role of the school principal is gaining importance in regard to recruitment that is especially aimed at SGB posts, but also regarding Departmental posts. The focus largely falls on projecting the schools in such a way that it would attract applicants towards applying for vacancies at schools, as well as making use of the recruitment resources in filling vacancies.

## 6.2.8 Selection

The selection process is exclusively aimed at ensuring that individuals are employed who could fill the post with success (cf. 2.8.9.1). The school principal also has a responsibility in managing this HRM task in co-operation with the school's SGB and the FSDoE. The HRM task is made complex as a result of the different categories of appointments, namely SGB appointments and Departmental appointments and the different staff categories at work in the school.

### 6.2.8.1 Representations of the selection process

Recommended representations of the selection process are made for the different categories of staff appointments and various staff categories.

### (a) Departmental appointment of educators

The selection process in regard to the appointment of educators is portrayed in Figure 6.1 according to the Heyns model (Heyns, 2003:13).

**Figure 6.1 Selection process for the appointment of educators in Departmental posts**

| Steps in selection process | Activities | Responsibility |
|---|---|---|
| 1. Compilation of criteria | • Job analysis<br>• Job description<br>• Job criteria | • School principal<br>• SGB |
| 2. Receipts of applications and processing of data | • Receipt of applications<br>• Compilation of master list<br>• Screening | • FSDoE |
| 3. Screening | • Compilation of<br>  - long list<br>  - short list | • School principal<br>• SGB<br>• Unions (observers)<br>• FSDoE (observer) |
| 4. Final screening | • Contact references | • School principal<br>• SGB |
| 5. Interviewing | • Planning and preparation of interview<br>• Conducting interview | • School principal<br>• SGB<br>• Unions (observers)<br>• FSDoE (observer) |
| 6. Administration and nomination | • Nomination of successful candidate<br>• Administration of process | • School principal<br>• SGB<br>• Unions (observers)<br>• FSDoE (observer) |
| 7. Aftercare and feed-back | • Successful candidates<br>• Unsuccessful candidates | • School principal<br>• SGB<br>• FSDoE |

(Heyns, 2003:12-13 and Department of Education, 2000b:1)

The school principal and the SGB play an important role in terms of the compilation of the shortlist and the interview done with candidates and the completion of administration in regard to the recommendation made by the SGB.

**(b) Appointment of educators in SGB posts**

Figure 6.2 portrays the selection process in regard to the appointment of educators in SGB posts. The Heyns model (cf. 6.2.8.1(a)) will be used as well.

**Figure 6.2: Selection process for the appointment of educators in SGB posts**

| Steps in selection process | Activities | Responsibility |
|---|---|---|
| 1. Compilation of criteria | • Job analysis<br>• Job description<br>• Job criteria | • School principal<br>• SGB |
| 2. Receipts of applications and processing of data | • Receipt of applications<br>• Compilation of master list<br>• Screening | • School principal<br>• SGB |
| 3. Screening | • Compilation of<br>  - long list<br>  - short list | • School principal<br>• SGB |
| 4. Final screening | • Contact references | • School principal<br>• SGB |
| 5. Interviewing | • Planning and preparation of interview<br>• Conducting interview | • School principal<br>• SGB |
| 6. Administration and nomination | • Nomination of successful candidate<br>• Administration of process | • School principal<br>• SGB |
| 7. Aftercare and feed-back | • Successful candidates<br>• Unsuccessful candidates | • School principal<br>• SGB |

(Heyns, 2003:12-13 and Department of Education, 2000b:1)

The school principal should play an important role in facilitating the SGB actions in managing the selection process and ensuring the professional appointment of candidate best fitting the profile of the vacant post.

**(c) Appointment of non-educators in Departmental and SGB posts**

It is recommended that the process as described in Figures 6.1 and 6.2 also be used for the appointment of non-educators. The departmental prescriptions and involvement are less in the case of appointment of non-educators in Departmental posts.

**6.2.8.2 Recommended guidelines for school principals regarding the selection process**

**(a) Compilation of criteria**

- All possible information regarding the post should be collected, down to the smallest details.

- The existing job analysis of the post should be viewed, or if it does not exist, a complete job analysis of the vacancy should be done by collecting and evaluating all possible information. As every post has its own demands and responsibilities, a job analysis is necessary (cf. 2.8.3.1 & 6.2.3).

- All the above-mentioned information should be used to establish descriptive and complete job criteria for the vacancy. These job criteria can be used to:
  - ➢ compile advertisement criteria;
  - ➢ make up the long list and the short list;
  - ➢ formulate the questions for the interview.

- The compilation of criteria is a scientific process that needs to be done completely for both Departmental and SGB posts.

**(b) Receipt of applications and processing of data**
- Applications for Departmental posts are handed in at the Education District Office where the school is situated, while applications for SGB posts are handed in directly at the school or a professional consultant, if used (cf. 2.8.9.6(c)(ii)).

- Applicants must receive proof that their application has been handed in and received. This makes inquiries easier and also grants a measure of trust in the process (cf. 2.8.9.6(c)(ii)). It is furthermore recommended that the receipt of applications for SGB posts must be handled in the same manner.

- Applications for SGB posts received at the school office must be handled and processed in a professional manner as it determines the image of the school in the eyes of applicants (cf. 2.8.9.6(b)(i) & 2.8.9.6(c)(ii)).

- The FSDoE compiles a master list of all the applicants who applied for the post. All applications must also be screened by the FSDoE to ensure that it meets the minimum requirements set as prescribed by the vacancy list (cf. 2.8.9.6(c)(ii) & Figure 6.2).

- Schools receive applications after this process has been completed (cf.2.8.9.6(c)(ii)).

**(c) Screening of applications**

- The criteria according to which the shortlisting is to take place, must be spelled out very clearly to ensure the smooth progression of the process. The panel that will undertake the shortlisting must be totally up to date on the set criteria. Criteria must not be discriminatory or unfair in any manner whatsoever. Every applicant must be handled with equality so that a short list can be compiled that would speak of honesty and professionalism on the side of the school principal and SGB (cf. 2.8.9.6(c)(ii)).

- A long list is compiled by excluding all applications that clearly do not meet the criteria set in place for the vacant post (Heyns, 2003:12).

- The long list is measured in accordance with these criteria and the best five applications that meet the prescribed criteria for the post, are placed on the short list (cf. 2.8.9.6(c)(ii)).

- The school principal must eliminate applications that do not meet the requirements set for the post at all in order to make the task of the SGB easier and thereby compiling a short list (cf. 2.8.9.6(c)(ii)). It is, however, only applicable to SGB appointments.

- The school principal must handle this process with transparency and correctness in order to make the SGB's selection process acceptable.

- The applicant's application form and curriculum vitae is used to compare the candidate to previously set criteria (cf. 2.8.9.6(c)(ii)) .

- Union observers and Departmental officials form part of this process and must be invited to observe the process. Proof must be kept regarding the notification of these parties (cf. 2.8.9.6(b)(ii)).

- Short listed applicants must be notified of the interview that will take place, giving all relevant information to the applicants (Department of Education, 2000b:10).

- All the parties involved in the interviewing and shortlisting process must receive a minimum of 5 days written notification of the particular processes (Department of Education, 2000b:10).

## (d) Final Screening

- According to Figure 6.1 the final screening refers to the contacting of references indicated by the applicants on the application.

- The task of contacting the references of the applicant can be shared by members of the interviewing committee, but usually this task is allocated to the school principal (cf. 2.8.9.6(b)(ii) & 2.8.9.6(c)(ii)).

- Complete records should be kept of the references' responses and should be presented at the meeting.

- The following questions can serve as a guideline for the person(s) that will contact the references of the applicant:
  - ➢ Do you know the applicant personally? How long have you known him/her?
  - ➢ Can you confirm the applicant's history of employment?
  - ➢ Would you please comment on the applicant's personality?
  - ➢ Do you think the applicant will be able to perform well in this job?
  - ➢ Is there anything else about the applicant that you think we should know about? (Department of Education, 2000b:10).

**(e) Interviewing**

- The interview is the only manner in which the SGB can recommend a suitable candidate after shortlisting has been completed.

- The formulation of questions must be handled in a professional way and the persons asking the questions must be well prepared for their task (cf. 2.8.9.6(c)(ii)).

- Ahead of time it should be ascertained what the SGB would want to hear from candidates in regard to certain questions and accordingly use these as evaluation for the candidates. The interview should not just be managed according to overviews and general impressions (cf. 2.8.9.6(b)(ii)).

- The evaluation of candidates should be linked to criteria and not be done by giving a general impression (cf. 2.8.9.6(b)(ii) & 2.8.9.6(c)(ii)).

- The performance standards as set out in the IQMS for school-based educators can be used as foundation for the formulation of questions for the interview (cf. Figure 6.3). The following guidelines are recommended in the use of the performance standards as set out in the IQMS:
  - ➢ With the formulation of the questions regarding a specific performance standard the "expectation" for each performance should be used as the point of departure.

> Every answer given by a candidate should be measured against the question that was formulated with reference to the relevant performance standard, before a point on the scale is given.

> The performance standards are allocated as follows in regard to the various post levels:

|        |   |                   |                  |
|--------|---|-------------------|------------------|
| 1 – 8  | - | post level 1      | educators        |
| 1 – 10 | - | post level 2      | HoD's            |
| 1 – 12 | - | post level 3 and 4| deputy principals|
|        |   |                   | school principals|

It is recommended that this division also be used for the interview (Free State Department of Education, 2004b:10).

- The questions must by typed out neatly in a big enough font so that candidates will be able to read it while the questions are being asked. This places candidates at ease and increases comprehension of the questions.

- The type of interview or a combination of interview techniques must be known to the panel in order to ensure a professional and fair process (cf. 2.8.9.6(b)(ii)).

- Candidates being interviewed in a language not specifically their mother tongue, must be set at ease as far as possible in the management of the interview.

- The professional image of the school must be consolidated in the interview (cf. 2.8.9.6(b)(ii)).

- Even unsuccessful candidates must not feel that they have been discriminated against during the interview and must maintain a positive view of the SGB and school (cf. 2.8.9.6(b)(ii)).

- School principals must take recommendations of the Department of Education into account to ensure the smooth running of interviews (cf. 2.8.9.6 (c)(ii)).

- The performance standards and criteria of IQMS are shown in Figure 6.3 and can be used as recommended points of departure for interviews.

**Figure 6.3: IQMS performance standards and criteria**

| Performance standard | Criteria |
|---|---|
| 1. Criteria of a positive learning environment | <ul><li>Learning space</li><li>Learner involvement</li><li>Discipline</li><li>Diversity</li></ul> |
| 2. Knowledge of curriculum and learning programmes | <ul><li>Knowledge of learning area</li><li>Skills</li><li>Goal setting</li><li>Involvement in learning programmes</li></ul> |
| 3. Lesson planning preparation and presentation | <ul><li>Planning</li><li>Presentation</li><li>Recording</li><li>Management of learning programmes</li></ul> |
| 4. Learner assessment / achievement | <ul><li>Feedback to learners</li><li>Knowledge of assessment techniques</li><li>Application of assessment techniques</li><li>Record-keeping</li></ul> |
| 5. Professional development in field of work / career and participation in professional bodies | <ul><li>Participation in professional development</li><li>Participation in professional bodies</li><li>Knowledge of education issues</li><li>Attitude towards professional development</li></ul> |

| | |
|---|---|
| 6. Human relations and contribution to school development | • Learner needs<br>• Human relation skills<br>• Interaction<br>• Co-operation |
| 7. Extra-curricular and co-curricular participation | • Involvement<br>• Holistic development<br>• Leadership and coaching<br>• Organisation and administration |
| 8. Administration of resources and records | • Utilisation of resources<br>• Instructions<br>• Record-keeping<br>• Maintenance of infrastructure<br>• Circulars |
| 9. Personnel | • Pastoral care<br>• Staff development<br>• Provision of leadership<br>• Building commitment and confidence |
| 10. Decision-making and accountability | • Stakeholder involvement<br>• Decision-making<br>• Accountability / responsibility<br>• Motivation<br>• Objectivity / Fairness |
| 11. Leadership, communication and servicing the SGB | • Leadership<br>• Support<br>• Communication<br>• Systems<br>• Commitment and confidence<br>• Initiative / Creativity |
| 12. Strategic planning, financial planning and education management development | • Strategic planning<br>• Financial planning<br>• Project management<br>• Communication |

(Free State Department of Education, 2004b:10-35).

- Criteria named in Figure 6.3 can be used as basis for questions that must be formulated with regard to the criteria.

- The questions aimed at each separate criterion can thereafter be used to determine a count for the relevant criteria.

- The mark for each separate criterion can then eventually be used to calculate an overall score for the candidate.

- Great care must be taken in the formulation of the questions, which can make the interview process much easier as far as the determination of the most successful candidate is concerned.

- These questions must also be formulated regarding the needs and the situation of the school.

**(f) Administration and nomination**

- Candidates must be ranked by the interviewing committee with reasons provided for the specific ranking (cf. 2.8.9.6(c)(ii)).

- This ranking of candidates must be submitted to a full sitting of the SGB for rectification, where after the nomination will be submitted to the FSDoE for appointment (cf. 2.8.9.6(c)(ii)).

- Administrative arrangements must be speedily handled by the SGB and the school principal.

**(g) Aftercare and feed-back**

- Both successful and unsuccessful applicants must be informed of the decision by the SGB. This process is of equal importance in the handling of both groups of applicants (cf. 2.8.9.6(c)(ii)).

- In the case of SGB appointments the process must be taken further with the successful candidate by contracting and the compilation of a job description in co-operation with the newly appointed staff member (cf. 2.8.9.6(c)(ii)).

## 6.2.9  Placement

Placement is seen as part of the selection process, but should never be managed as a completed process (cf. 2.8.10). As a specific person was appointed for a specific post, placement does not play a major role in the HRM of schools. It still seems, however, to be a very useful technique to submit staff, for whichever reason, to re-placement within the functioning of the school. It can be a very useful HR technique in the following cases:

➢ Restructuring of a post of a staff member who is possibly not coping with the post or in the case of a post where placement did not take place.

➢ Placement can also be very handy in placing a person into a different staff category.

➢ Placement is, however, very valuable when a person is employed who is to be used as a terrain worker as part of the terrain staff.

➢ Re-placement could also be done in due time, should a person reveal a notable skill or talent during the time of service.

## 6.2.10  Induction

The induction process and the progression thereof is a very important HRM task of the school principal (cf. 2.8.11.4). A well managed induction process will ensure the smooth inclusion of a newly appointed staff member, thus ensuring a transition process without any undue trauma, but more than this, it also has legal repercussions in regard to new appointments. At some schools the induction process is a badly neglected one and therefore the school principal should also take a leading role in regard to induction. The well-managed induction process ensures that a newly appointed staff member forms a professional image of the school from the start. The

induction process should never be replaced by the use of the staff manual, although these show areas of agreement.

### 6.2.10.1   Criteria for the school's induction policy

It is recommended that all schools should have an induction policy which provides specifically for the following:

- An active role for the school principal in the whole induction process.

- Total involvement of staff to ensure full knowledge of tasks, responsibilities, procedures and working environment.

- Regular follow-up actions must ensure that the induction policy stays relevant to the school and to ascertain if staff subjected to the induction process are coping with their new employment environment.

- Comprehensive usage of various checklists to ensure that all aspects of the school are covered.

- Signing of checklist by new employees and relevant supervisors to ensure that  the induction process was completed.

- Adjustments in the induction process to accommodate different staff categories.

### 6.2.10.2   Aspects to be addressed in the induction policy

It is recommended that the following aspects be addressed in the induction policy:

- School history and background information
- Mission and vision
- Hierarchical functioning of school
- Communication
- Introduction of the staff manual
- Disciplinary procedure
- Grievance procedure
- Academic functioning
- Functioning of extra-mural activities

- Health and safety at the school
- General school management

### 6.2.10.3  Constitution of induction team

The constitution of the induction team should be determined by the staff category of the staff member to be appointed. The induction process will differ for the following staff categories:

- Educators
- Administrative staff
- Terrain staff
- Hostel kitchen staff
- Hostel supervisory staff

The recommended constitution of induction teams for the various staff categories is shown in Table 6.1

**Table 6.1:  Induction teams for different staff categories**

| Induction team | Staff categories | | | | |
| --- | --- | --- | --- | --- | --- |
| | Educator | Administrative | Terrain | Hostel kitchen terrain | Hostel supervisor |
| School principal | x | x | x | x | x |
| Senior staff member | x | x | x | x | x |
| Grade manager | x | | | | |
| Academic manager | x | x | | | |
| Learning area manager | x | | | | |
| Sport manager | x | x | x | x | x |
| Culture manager | x | x | x | x | x |
| Administrative official | x | x | x | x | |
| Financial official | x | x | x | x | x |
| Hostel warden | x | x | x | x | x |
| Household supervisor | | | | x | x |
| Terrain manager | x | x | x | x | x |

The constitution of the induction team can be adjusted to the school's unique circumstances.

It is recommended that the whole induction team should meet with the new staff member. This is a valuable opportunity to introduce the induction team to the new staff member and explain the role of each member of the induction team. It will be very beneficial if these roles could be indicated on paper.

### 6.2.10.4  Induction checklist

The constitution of a comprehensive induction checklist is recommended to be used for every category of newly appointed staff (cf. 2.8.11.7(d)). It should comprise the different sections or tasks for which a new staff member is to take responsibility and show all relevant aspects. After the induction team member is satisfied that the person has mastered the aspects as contained in the checklist, the member of the induction team as well as the new staff member should sign the relevant section of the checklist. The school principal must be the last person to sign the checklist and the process would then be seen as having been completed.

The recommended checklist is shown as an example in Appendix F. The checklist of the person in charge can be seen as the summary in the induction process. Every member of the induction team named in Appendix F should therefore use a section of the checklist to facilitate the induction process. A checklist must be completed for each new appointment according to the staff category the appointment belongs to. If a school principal is to design an induction process, the checklist has to be compiled in such a way that every eventuality is covered and placed under a responsible person.

It is further recommended that the various role players within the induction team address different aspects regarding induction. Overlapping must be eliminated as far as possible and the aspects that must be addressed by the various role players can be re-divided or adjusted to fit every school's unique circumstances. The division of the different aspects can be done as follows:

### (a)  School principal

It is recommended that school principals' role with regard to induction and specific aspects regarding induction be as follows:
- Involvement in general topics instead of job-related issues, as involvement in job-related issues could lead to overlapping. To address this the various

aspects can take place over a period of time and should be divided into "need to know" and "nice to know" information (cf. 2.8.11.7(a)). These general topics include, amongst others, the following:

- ➢ the school's history and aspects of school culture
- ➢ organizational structure (organogram)
- ➢ general policy and procedure
- ➢ school-community relationships
- ➢ vision and mission of the school (cf. 2.8.11.7(b)(i)).

- Explanation of the general job description of the person, without resulting in overlap with job-related issues. General expectations can also be addressed here (Strauss, Personal interview: 5 March 2004a).

- Introduction of the newcomer specifically to all categories of staff, which does not necessarily have to take place at the same time, seems to be one of the most important tasks of the school principal. If this aspect is handled with the necessary professionalism and thoroughness, the newcomer should be comfortable from the beginning (Strauss, Personal interview: 5 March 2004a and Coetzer, Personal interview: 5 March 2004) (cf. 2.8.10.1).

- Active involvement by the school principal with regard to the induction of all categories of staff is of prime importance. School principals must specifically accompany a newcomer to his/her place of work/classroom in order to show immediate interest (Coetzer, Personal interview: 5 March 2004).

- Communication on the first working day with a newcomer is a vital aspect regarding the first working day and the school principal should be the first, but also the last person with whom the newcomer should communicate.

**(b)  Senior staff member**

Regarding the role of a senior staff member (preferably a deputy principal or HoD) it is recommended that:

- the particular senior staff member should fulfil the role as a mentor towards the newly appointed employee or an employee that was promoted (cf. 2.8.11.6);

- the senior staff members should fulfil a role very similar to the that of the school principal;

- induction towards specific areas like discipline or finance should be handled by the senior staff member if this is the section of the school where he/she is in charge.

## (c) Grade manager

Grade managers (in big schools) fulfil the role of the immediate head of educators in schools. According to Marais, Van Vuuren, Mielman, Crouch, Prinsloo, Roos and Smit (Personal interviews: 5 March 2004), it is recommended that the role of grade managers with regard to induction entails the following:

- To welcome a newcomer to the grade in such a way that the person does not feel like an outsider, but is immediately included as a member of a smaller team.

- To explain general school organization and management in detail by referring to:
  - ➢ academic organization and management;
  - ➢ general organization and management of aspects like photocopiers, telephones, staff fund, lay-out of the school;
  - ➢ discipline management;
  - ➢ classroom management;
  - ➢ general functioning of the grade;
  - ➢ extensive explanation of the job description and personal duty sheet.

- To fulfil the role of guardian for the newcomer in the grade, whether it is a new appointment or merely a staff move

- To discuss the staff manual in order to address all aspects of the school.

- To manage the induction process for the newcomer.

**(d) Academic manager**

Academic managers fill the role with regard to the core business of the school, namely the management of academic affairs. It is recommended that the academic manager handles the academic management of the school in broad, general terms in the following way:

- supply educators with the necessary policy documents regarding the school, department and learning areas;

- explain the broad academic policy of the school, without overlapping in regard to learning areas;

- provide assessment guidelines and ensure that the educator understands and can apply it;

- determine which academic training the educator possesses regarding the curriculum;

- be knowledgeable regarding all academic issues (Coetzer, Personal interview: 5 March 2004 and Strauss, Personal interview: 5 March 2004a).

**(e) Learning area manager**

The learning area manager should ensure that the newcomer can teach and administrate the learning areas for which he/she is responsible in depth. It is recommended that the learning area manager:

- discuss the learning area policy to cover all prescriptions and the policy in full;

- ascertain if the educator possesses a clear knowledge of the learning area;

- discuss learning area assessment and the application thereof;

- explain time management with regard to the time table of learning areas (Venter, Personal interview: 5 March 2004: Strauss, Personal interview: 5 March 2004b: Fredericks, Personal interview: 5 March 2004: and Prinsloo, Personal interview: 5 March 2004).

## (f) Sport and cultural managers

As extra-mural activities play a significant role in any school, it is recommended that sport and cultural managers manage the induction of the newly appointed educators as follows:

- present managers of various sport and cultural activities, specifically those activities (codes) where the staff member will be involved;
- explain the functioning of the sports and cultural programme;
- determine qualifications and experience;
- present sports wear of coaches;
- facilitate integration with sports bodies;
- explain school policy regarding sport and cultural activities;
- establish knowledge regarding the management of equipment to be used in activities;
- ensure that the educator has experience and the necessary documentation to transport learners;
- provide training if the educator has not previously presented the activities for which he/she is responsible;
- communicate with parents regarding participation by learners by educators;
- determine if the educator has a first aid qualification and experience needed to be able to manage an emergency situation;
- communicate with hostel regarding participation of hostel learners in sport and/or cultural activities by educators;
- describe professional behaviour during activities where other schools are involved;
- ensure that the person has the necessary information regarding the safety aspects of sport and/or cultural activities (Venter, Personal interview: 5 March 2004 and Fowler, Personal interview: 5 March 2004).

**(g) Administrative manager**

It is recommended that all newly appointed staff be fully trained regarding general administrative management of the school. This is done in the following ways:

- provide training and information regarding staff affairs, like, amongst others, leave, housing subsidy;
- distribute supplies like stationery, photo copy paper;
- discuss administration with regard to typing (Jacobs, Personal interview: 5 March 2004);
- supply information with regard to office procedure regarding learner administration;
- explain chain of command in the administrative management of the school.

**(h) Financial official**

It is recommended that the financial official provide the newcomer with thorough training regarding the management of finances by giving attention to the following aspects:

- handling of all cash or other monetary values;
- providing training with regard to the issuing and control of receipts;
- reporting cash shortages;
- safekeeping of documentation regarding fund-raising;
- providing information on managing purchases and personal claims regarding purchases;
- applying financial principles (De Klerk, Personal interview: 5 March 2004).

**(i) Terrain manager**

It is recommended that the terrain manager provide information and training regarding the following:

- control of keys;
- control of supplies;
- handling of dangerous materials and/or equipment;
- use of vehicles;
- appropriation of equipment and furniture;
- reporting of defects;
- maintenance of facilities

**(j)  Hostel warden**

Hostel wardens fulfil an important role in supplying information regarding staff liaison between the school and hostel and providing training of supervisory staff at the hostel. It is recommended that hostel wardens be focused on the following:

- supplying information to ensure proper interaction between school and hostel;
- providing training regarding the duties of hostel staff working with learners.

In conclusion it needs to be stated that the aforementioned should only serve as a guideline regarding the induction of staff, and it should also be noted that these guidelines are mostly applicable to educators. It can, however, be used as a point of departure in developing a comprehensive induction process for all categories of staff.

### 6.2.10.5  Staff manual (handbook)

The staff manual is a very important part of the induction process and should serve as reference for a newly appointed member of staff, as well as for existing staff. The various staff categories should receive a specific manual for their relevant staff category (cf. 2.8.11.7(c)). This staff manual should also be continuously updated and revised.

### 6.2.10.6  Induction follow-up

The new appointee must be followed up at the end of the first day and thereafter as the need arises. This process of induction follow-up must take place with new appointments, present staff and staff members who had been promoted or transferred from one post to another (cf. 2.8.11.7(f)).

### 6.2.10.7  Induction revision

The total induction process should be revised continuously and kept up to date in order to lead newly appointed staff professionally in that person's new post.

### 6.2.10.8  Induction process for schools

A recommended induction process for a school is portrayed in Figure 6.4. The structure is based on the preconception that the school does not have an own induction process.

**Figure 6.4:  Proposed induction process for a school**

```
┌─────────────────────────────────────────────────────────────┐
│                                                             │
│   ┌─────────────────────────────────────────────┐           │
│   │  Committee appointed to design an induction  │           │
│   │           policy for the school             │           │
│   │            *  Formulate policy              │           │
│   │            *  Compile checklists            │           │
│   └─────────────────────────────────────────────┘           │
│                        │                                     │
│                        ▼                                     │
│   ┌─────────────────────────────────────────────┐           │
│   │              INDUCTION PROCESS              │           │
│   └─────────────────────────────────────────────┘           │
│                        │                                     │
│                        ▼                                     │
│   ┌─────────────────────────────────────────────┐           │
│   │    Appoint an induction team when a new      │           │
│   │             appointment is made             │           │
│   │   *  What staff category is new appointment? │           │
│   │         *  Open an induction file           │           │
│   │        *  Get induction team together       │           │
│   └─────────────────────────────────────────────┘           │
│                        │                                     │
│                        ▼                                     │
│   ┌─────────────────────────────────────────────┐           │
│   │ Introduce newly appointed member of staff to │           │
│   │ the induction team and explain induction     │           │
│   │ process and the role of each member of the   │           │
│   │ induction team.                             │           │
│   └─────────────────────────────────────────────┘           │
│                        │                                     │
│                        ▼                                     │
│   ┌─────────────────────────────────────────────┐           │
│   │ Members of induction team discuss checklist  │           │
│   │ with new employee and finishes checklist and │           │
│   │ hand it over to the person in charge of the  │           │
│   │ induction process.                          │           │
│   └─────────────────────────────────────────────┘           │
│                        │                                     │
│                        ▼                                     │
│   ┌─────────────────────────────────────────────┐           │
│   │ Person in charge of induction process signs  │           │
│   │ off the process.                            │           │
│   └─────────────────────────────────────────────┘           │
│                        │                                     │
│                        ▼                                     │
│   ┌─────────────────────────────────────────────┐           │
│   │ Follow-up of the induction process with      │           │
│   │ newly appointed staff                       │           │
│   └─────────────────────────────────────────────┘           │
│                        │                                     │
│                        ▼                                     │
│   ┌─────────────────────────────────────────────┐           │
│   │   Constant revision of induction process     │           │
│   └─────────────────────────────────────────────┘           │
│                                                             │
└─────────────────────────────────────────────────────────────┘
```

### 6.2.10.9  Conclusion

During the induction process a guardian or buddy-system (mentor) may be used. It can be done in addition to the induction process, but it should never replace the induction process. Induction of new staff members should never be neglected, because the proper management of the process will make the integration of newly appointed staff much less traumatic and ensure that the person will be nearly immediately productive.

## 6.2.11  Career management

Career management is a very important responsibility resting on the shoulders of the school principal. School principals should be actively involved with career management of all categories of staff.

To establish the dependent process of career management calls for much input from the school principal, but once the process is established, it should show a natural flow. People without such an interest in their daily work can only be identified if the process of career management has been completed with all staff members and thereafter the staff can be identified upon whom can be focused in the process of career management (cf. 2.8.12.1 & 2.8.12.2).

### 6.2.11.1  Career management implemented at schools

Individual career planning and organisational career management consist of specific steps as outlined in literature (cf. 2.8.12.3 & 2.8.12.4).

This theoretical background should be used in establishing a career management process for schools as illustrated in Figure 6.5.

**Figure 6.5:   Career management in schools**

Sell the career management process to staff

Self evaluation by individuals by:
- drawing a career line
- writing down 20 career describing adjectives
- regrouping of career adjectives

Formulate objectives that:
- describe ideal attainments in future career
- prioritise career objectives

Formulate career plans in order to achieve goals by:
- identifying 3 very important objectives
- drawing up action plans to achieve objectives

(Brazelle, s.a.:s.a.).

It is recommended that Appendixes G, H and I should be used to facilitate the process of career management in schools. The application of career management should be structured to accommodate all staff categories and levels of employment at schools. The appendixes consist of the following phases:

- Phase 1: Where am I now? (Appendix G)
- Phase 2: Where do I want to be? (Appendix H)
- Phase 3: How do I get there? (Appendix I)

Recommended application of the three phases will be explained now to achieve maximum usage of career management of staff as an HRM task of the school principal.

### 6.2.11.2 Guidelines for career management at schools

School principals could use the following recommended guidelines to implement and manage career management in schools:

- The process should be honest and transparent.
- Involve the person concerned with complete openness.
- Adjust process to the staff category concerned.
- Do career management for all staff categories.
- Encourage staff to become actively involved in the process (cf. 2.8.12.5).

Career management should be approached in a positive frame of mind at schools with the exclusive aim being to convert the staff's personal aspirations into organizational benefit by orienting the staff actively towards commitment towards themselves and eventually also towards the organization.

## 6.3 HUMAN RESOURCES MAINTENANCE

HR maintenance plays an important role in ensuring the success of a school principal as HR manager as well as in achieving the goals of the school as educational institution, as staff are, to a large extent, the eventual determining factor for the success of a school.

## 6.3.1  Training and development

Training and development of the staff is aimed at realizing the education and training task of the school as successfully as possible (cf. 3.2.2.1).  For the purposes of this study focus will be placed on the development and training of staff at a school that is not supplied by the FSDoE. The view is also held that training and development should involve all staff categories at schools.

Training and development should therefore be aimed at the following staff categories:

- educators (including the school principal)
- administrative staff
- terrain staff
- hostel staff

### 6.3.1.1  Introductory recommendations regarding training and development

It is recommended that school principals consider the following with reference to training and development of staff:

- SGB's must make provision in their budget for funds that may be allocated to training and development of staff (cf. 3.2.9).

- SGB's not in possession of such funds, must make use of resources such as universities, universities of technology, business schools and individuals in fulfilling the role as institution of training.

- Funds paid to the Skills Development Fund for SGB appointments and funds from the Skills Development Budget from the FSDoE (for Departmental staff) must be utilized (cf. 3.2.7.2).

- Initiative must be taken by school principals in identifying aspects of training and development (cf. 3.2.6).

- Involve staff in order to ascertain their true needs (cf. 3.2.4 & 3.2.6).

- Sell the idea of training and development to staff as a recipe for personal development and not as one of extra work or time (cf. 3.2.4 & 3.2.6).

- See training and development as a tool of empowerment in the hands of the school principal to give staff a versatile insight into their career (cf. 3.2.6).

- Empower staff in order to make the management of the emotional side of their career possible (cf. 3.2.4).

### 6.3.1.2 General aspects of training and development of all staff categories

There are certain aspects that are applicable to all staff categories. The different categories of staff will, however, not be handled together, as the approach and content of all staff categories don't necessarily agree. The following aspects should be addressed in general for all staff:

- General computer training
- Cultural diversity
- Health and safety (e.g. HIV and Aids training)
- General financial information
- Emotional consultation (e.g. marriage consultation)
- Ethics
- Personality development
- Disciplinary matters
- Grievance procedures
- Work pride
- Leadership (cf. 3.2.4).

### 6.3.1.3 Training and development of educational staff

Educational staff consists of school principals, deputy principals, heads of department and educators. Recommendations for training and development of educational staff are handled as a whole as the tasks of the different staff categories overlap and training and development should also be presented in overview as staff members need to be prepared for management tasks.

The recommended topics for training and development of educational staff can be summarized as follows:

- additional academic enrichment:
  - OBE training
  - classroom techniques
  - use of technology
  - academic administration
  - academic legislature and policy

- handling conflict:
  - in the classroom
  - in own personal life

- disciplining learners:
  - classroom disciplinary management
  - disciplinary matters in own family

- financial information:
  - day to day management of finances of school
  - personal enrichment for example
    - budget management
    - simple fiscal economic policy
    - exchange rates, international economic policy
    - investment advice

- legal aspects:
  - in the educational situation
  - personal life
  - educational law
  - employment rights

- specialized computer training:
  - classroom use
  - personal use

Some of these aspects can be addressed superficially, but will lead to life empowerment for educational staff at the school.

### 6.3.1.4 Training and development of administrative staff

Administrative staff also includes financial officials and many points of agreement can be found with aspects of the training and development of education staff. The recommended training and development of administrative staff can be summarized as follows:

- specialized computer training
- written and language enrichment
- telephone and reception etiquette
- personal appearance
- administrative skills ( e.g. filing)

### 6.3.1.5 Training and development of terrain staff

Although this staff category represents unskilled labour in the majority of cases, their training and development needs to be seen as important, and as vital empowerment for this staff category.

The recommended training and development of terrain staff can be summarized as follows:

- addition of new skills    -    vehicle driver
                           -    tools and machinery
                           -    knowledge of gardening and care

- financial advice    -    personal budget management
                      -    dangers of cash loans
                      -    insurance

- guidance in fulfilling routine tasks with pride.

### 6.3.1.6 Training and development of hostel staff

This staff category also do routine tasks, therefore training and development can be used to add greatly to their personal growth.

The recommended training and development of hostel staff can be summarized as follows:

- addition of skills           -   e.g. cooking techniques, menu planning
- hygiene                      -   e.g. food preparation, cleaning
- economical management        -   e.g. saving

### 6.3.1.7  Summary

The training and development of staff should be a matter of the highest priority. Training possibilities need to be viewed over a wide spectrum and not limited to a certain category.

## 6.3.2  Performance Appraisal (PA)

School principals should manage the appraisal of non-educators as well as educators.

### 6.3.2.1  Recommendations to assist school principals

The following recommendations are made to assist school principals with the appraisal process:

- Approach PMDS for non-educators and IQMS for educators positively and sell it to the school staff, not just as a process of reward, but also as a development resource.

- Manage the process professionally by not viewing it as extra paper work, but rather as training and development of staff.

- See all appraisals as ways of motivating staff by putting effort into the completion thereof.

- Handle the process with transparency by involving the appraisee completely in the process.

- Be honest and straight in dealing with staff.

- Use the appraisal interview as a personal contact session with staff member.

- Ensure that staff for who incidents have to be recorded keep a diary up to date in which incidents are documented.

- Record incidents on a continuous basis to verify incidents for future usage.

- Administer appraisal processes accurately and file on staff's personal files.

- Do PMDS for non-educators who are appointed in SGB posts (cf. 3.3.5.5 & 4.3.5.2).

- IQMS for educators in SGB posts should also be done (cf. 3.3.4.4 & 4.3.5.3).

- Accept ownership of appraisals and be actively involved in order to underwrite the importance and value of the various processes.

- Amplify Departmental prescriptions regarding IQMS and PMDS by adding an own uniqueness to the process.

- Emphasize continuously the value of PMDS and IQMS so that staff buy into the process.

### 6.3.2.2  Performance management

Measuring performance is very important to the school, but also to individuals. School principals must take the unique circumstances of their schools and staff categories into consideration in the constitution of performance standards.

### (a)  Educators

It is recommended that educators be developed according to the following categories:
- Academic performance
- Administrative performance

- Relationship with parents
- Relationship with learners
- Extra-mural activities

Learners, parents and colleagues should be involved in the measurement of performance.

**(b) Non-educators**

The performance of this staff category can be appraised according to the following categories, namely administrative, terrain and hostel. The allocation of tasks in these categories can be used as performance standards.

The value of PMDS and IQMS must never be underestimated and the school principal must ensure, by means of positive leadership, that this HRM task plays an important role in the eventual success of the school.

## 6.3.3  Compensation management

Compensation management is a more important HRM task than is generally realized. The reason for this is that it entails much more than merely the payment of salaries. It also includes benefits, work challenge and working conditions (cf. 3.4.1).

Compensation management is therefore not just applicable to the SGB appointment who get their remuneration from the SGB, but all staff working at the school. It is therefore important that school principals take note of the total compensation management function (task) for the total staff corps.

Although the remuneration of staff (extrinsic compensation) does not play a decisive role in regard to the motivation of specific educators, intrinsic compensation does play a very important role in motivating educators and all staff categories (cf. 3.4.2).

## 6.3.4  Motivation

### 6.3.4.1  Introduction

Staff at schools and specifically educators need much support in the present teaching setup. Educators are exposed to the threat of rationalization, redeployment, big and

uncontrollable academic classes, academic policy change (OBE), limited opportunities for promotion and the sustained negative reporting about education as a whole where all educators are lumped together (cf. 3.5.8).

The position of non-educators is not all roses either. There is also continuous talk of decrease of staff, the staff allocation of hostels which is about to change radically, as well as the posts of factotums and cleaners at schools entering a stage of being gradually phased out (cf. 3.5.8).

The school principal as education leader and as HR manager is faced with the challenge of ensuring a well-oiled staff corps in order to realise the school's education and training goals. The school principal must therefore give much attention to the establishment of motivational techniques, but must simultaneously connect with all categories of staff on their own levels.

### 6.3.4.2  Motivational principles as guidelines for school principals

The following recommended principles should be taken into account by school principals as guidelines for the motivation of staff:

- Honest and heartfelt intention with motivation.
- Motivation by means of empowerment.
- Adding value by motivation.
- Relevant occupational motivation.
- Motivation by setting an example.
- Motivation by showing an interest.
- Motivation by humanity.
- Continuous motivation (cf. 3.5.7.3).

### 6.3.4.3  Motivational techniques

The school principal can make use of the following motivational techniques as additional techniques in order to fulfil the motivational task of the school principal.

- **Professional motivational speakers**

By necessity professional motivational speakers have a certain financial implication and are often out of reach for most schools. It is, however, still a very good source of

short-term motivation that will not necessarily impact the lives of the school staff the next day.

The most important benefit of hosting a professional speaker is the fact that people find it enjoyable listening to a stranger focused on stimulating people emotionally. A problem with some speakers arises in that the whole staff corps cannot be involved simultaneously, because different categories of staff have different frames of reference.

It is still, however, a very good motivational technique and where possible this financial obligation should be placed within the budget or a sponsorship must be established to cover costs.

- **A respected person**

A leader or respected person from the community or society in general can be used as motivational speaker. If the staff hold this person in high regard, such a person could be utilized very successfully. It is very important that the school principal ensures that such a person is not trying to establish a personal ideology. A neutral message in the case where the respect that the staff feels towards such a person, causes positive acceptance of such a message, would lead to successful motivation, although this form of motivation also produces only short-term results.

Different people can also be used for the different staff categories, as it would be very difficult motivating educators, administrative, terrain and hostel staff at the same time.

- **Motivation through style of leadership**

The school principal must motivate staff by means of a personal style of leadership, thereby winning their trust. Staff members are automatically motivated if they respect the school principal who uses positive behaviour to motivate people into action.

- **Situation motivation**

School principals must never let the opportunity pass for "on the spot" motivation given by encouraging them and complementing them on a job well done, or for a sustained good effort.

This type of motivation can be very useful in the case of PMDS and IQMS by noting it on the staff member's personal file. This might sound like an administrative nightmare but, in terms of IQMS and PMDS, it has user value because it enables the school principal to monitor the motivation of staff (cf. 3.3.4.4 & 3.3.5.2).

- **Planned motivation**

This motivational technique is a strategic technique that might be seen by the staff as artificial and therefore planning and execution is of extreme importance.

The technique boils down to the following: the school principal divides the total staff into weeks or months and on a day the principal focuses on the specific staff member. A short report may be written at the end of the period and placed on the personal file of the staff member.

Planning is critical and the person(s) involved must be addressed when such people are actively involved in certain tasks. The level of involvement must, however, not appear unnatural.

This technique boasts the benefit that the school principal is personally involved in matters of staff and can also get to know the staff better.

- **Interest motivation**

Staff can be motivated by the fact that an interest is shown in their daily activities and circumstances of staff members and their families. Aspects that should be addressed include the following: good birthday wishes for the staff member and the staff member's family; acknowledge achievement in the family, hospital visits and so forth. It is very important that this attention must be continuous and must be sincere.

- **Motivation by personal example**

The school principal should have a positive attitude that can serve as an example to staff members to ensure effective execution of delegated tasks. School principals must have knowledge of the academic and extramural activities of the staff, as well as non-educators.

- **Emphasize the school's achievement**

The achievements of a school can make staff proud that they belong to this specific school and can also have a total motivational effect on the whole staff.

### 6.3.4.4 General guidelines to the school principal in regard to motivation

- Motivation can be spontaneous or planned.
- All staff categories must be motivated.
- Adjust motivation to the situation and relevant staff category.
- The choice of people from outside the school needs to be considered carefully.
- Concentrate on the strengths of staff.
- Try to manage mistakes and transgressions positively.
- School principal must also be self-motivated to serve as an example.

### 6.3.4.5 Summary

Motivation is an important and very valuable way of focusing a school on its exclusive goal of quality education and training. A school principal should make use of resources, such as parents, learners, and colleagues who are clients of the school to give inputs towards the motivation of staff by being actively utilized for this purpose from their own personal experience dealing with a specific person at school.

## 6.3.5 Quality of work life

Quality of work life (QWL) specifically aimed at education is an aspect that is coming to the fore more and more. Educators have seldom experienced pressure as is the case at present. The circumstances in the classroom are representative of great pressure and frustration for many an educator. QWL is becoming more important in making the situation at school, and specifically to the educator, much more pleasant. The other staff categories are not necessarily exposed to the same difficult situation, although their QWL should not be neglected either (cf. 3.6.4 & 3.6.5).

### 6.3.5.1 Improvement of QWL of education staff

The school principal should make use of the following guidelines in order to ensure QWL for education staff:

**(i) Appointment**

- Draw up legal contracts for SGB appointed staff.

- Describe a negotiable package fully in a contract.

- Be honest with SGB staff about work expectations.

- Communicate problems regarding rationalization of Departmental posts with staff at the earliest possible opportunity.

- Consider redeployment if a school is overstaffed, taking into consideration the educator(s) availability (cf. 3.6.4).

**(ii) Educator rights**

- Make staff aware of their rights and keep them informed in this regard.

- Explain service conditions to staff.

- Train staff in regard to disciplinary procedures.

- Expose staff to grievance procedures.

- The school principal should never feel threatened by staff's knowledge regarding their rights (cf. 3.6.4).

**(iii) Management style**

- Involve staff with decision-making in the school.

- Trust staff with sensitive information.

- Breed trust through transparent management.

- Apply participatory and motivational leadership.

- Acknowledge staff in the improvement of QWL.

- Make the work situation interesting and challenging.

- Involve staff in work distribution at school.

- Ensure a fair distribution of work for all staff members.

- Empower staff by means of participation.

- Clothe staff with confidence to be able to give input.

- View staff input as an expression of personal feelings and frustrations.

- Take staff's individual personal circumstances into consideration at all times by having a positive attitude (cf. 3.6.4).

**(iv) Staff training and development**

- Do complete career management (planning ) for staff.
- Create and use opportunities for training and development of staff.
- Organise team-building activities for staff (cf. 3.6.4).

**(v) Working conditions**

- Establish safe and healthy working conditions.
- Create a pleasant atmosphere in classrooms.
- Ensure availability of the necessary equipment and technology.
- Provide personal space for staff in regard to staff rooms, toilets, safety of vehicles (covered parking) (cf. 3.6.4).

### 6.3.5.2 QWL of non-educators

The school principal must selectively consider the aspects mentioned in paragraph 6.3.5.1 and adjust these to other staff categories. The following aspects should, however, never be disregarded:

- Non-educators should never be seen as inferior as compared to educators.
- Handle different non-educator categories according to their specific frames of reference.
- Take into consideration the fact that terrain staff and hostel staff can have the lowest QWL in the school, in terms of, amongst others, job satisfaction, acknowledgement of work, participation in decision-making and general empowerment and personal circumstances.

### 6.3.5.3 Summary

A happy staff in general and specifically individually, is usually productive, active, proud and motivated in the completion of its daily task. School principals must address QWL of staff in order to achieve the goals of the school.

## 6.3.6 Leadership

Leadership is a very complex management aspect for any school principal. School principals is seen as the common denominator in schools, with HR leadership (specifically in terms of staff) being one of many hats that the school principal has to wear on a daily basis. As mentioned in Chapter 1, school principals are not truly

trained and prepared for their HRM task and the attendant HR leadership. Leadership in the education milieu and characteristics of the school principal have already been covered in full (cf. 3.7.3 & 3.7.4) and therefore, for the purposes of this chapter, focus will be put on the techniques of the school principal in regard to personal leadership survival.

### 6.3.6.1 Recommended leadership techniques for the school principal

The recommended techniques used by the school principal as part of his/her leadership apparel and eventual leadership survival can be summarized as follows:

- Get professionally relevant HR training and development to make the school principal an empowered leader in all aspects of HRM – it provides esteem and acceptance to the school principal.

- Develop an accessible style of leadership resulting in satisfaction amongst staff – this provides the school principal with a position of power without forced leadership.

- Accept that all school leaders are not natural leaders – all individuals must therefore live out their own leadership according to their own personality and leadership abilities.

- Group leadership practices around personal strengths and weaknesses.

- Accept that this leader of the school (the school principal) can also make mistakes and that this situation would then have to be managed with ingenuity, pardon and acceptance so that the school principal can come out the other side with dignity and respect.

- Guard against being merely a manager rather than a educator in bone and marrow – good management principles can never replace or overshadow teaching principles.

- Acknowledge that the school principal is in the hot seat daily and therefore it is important to have a confidante on staff with whom problems, difficult situations and extreme crises can be discussed – no one's shoulders are wide enough to carry this load alone.

- Share leadership skills and opportunities with potential leaders on staff – it also gives the school principal the opportunity to divide leadership overload.

- Set an example for the staff in having work pride.

- Never place the staff under undue pressure through own actions – it often leads to dissatisfaction amongst staff members and places the leadership and management abilities of the school principal under suspicion.

- Avoid too much pressure and difficult situations by handling situations in anticipatory leadership fashion, thus lessening possibly negative results – it also increases the esteem in which the school principal is held as leader.

- The school principal should, however, never lose sight of the fact that a true leader is a slavish follower of an approach towards other humans that speaks of an acceptance of their true worth (cf. 3.7.2; 3.7.3 & 3.7.6).

From the above-mentioned it can clearly be seen that the school principal should act with leadership laced with self-preservation in order to be able to lead the staff effectively and professionally. The versatile leadership of the school principal poses a definite challenge, but is also an obstruction as a result of the diversity of the groupings over which the school principal resides.

## 6.3.7 Groups in schools

As group formation plays a determining role in modern day society, groups also have a great influence on the HRM task of the school principal. The school principal needs to delegate much responsibility and therefore this aspect of HRM must be managed with great care and skill (cf. 3.8.1).

### 6.3.7.1 Role of groups in schools

The school principal should work in conjunction with many varied groupings in order to achieve the educational and teaching goal of the school. Groups should play a definite

role in school management and therefore having a great influence on the school principal, include amongst others:

- school staff

- parents

- learners

- community groupings (cf. 3.8.1).

For the purposes of this study focused will be placed on the staff of the school and sub-groupings developing from the staff corps. These groups have to be handled by the school principal as part of his/her HRM task.

The school principal must therefore consider group formation within staff categories, as well as the overlap that takes place between these groupings. Some of these groupings are:

- educators

- administrative staff

- terrain staff

- hostel staff

### 6.3.7.2 Educators and groups

The teaching corps of a school should function largely within committees (also called boards). These committees or boards should function across a wide variety of terrains, such as:

- academic

- extra-mural activities

- management

- other

### (a) Academic

The purpose of committees or boards functioning in the academic field is to manage academic and related matters. Examples of such recommended committees or boards are as follows:

- overall academic management

- academic phase committees, for example, foundational phase, intermediate, senior and FET
- learning area committees
- grade committees
- prize-giving committee
- academic support management, including RE, special education and didactic aid.

## (b) Extra-mural

The extra-mural section of a school represents sport, culture and academic activities and it is recommended that different committees with different functions represent these sub-activities. This include:

- overall extra-mural management
- sport management – with every sport having its own committee
- cultural management – also having a committee representing the various cultural activities
- academic extra-mural management – including library, Expo and afternoon care

## (c) Management

These committees or boards represent, to a large degree, the top management of the school. Examples are as follows:

- SMT
- SGB

## (d) Other

Further examples of recommended committees or boards are the following:

- marketing committee
- safety committee
- fund-raising committee
- financial committee
- catering and functions committee
- clothing committees

### 6.3.7.3  Administrative, terrain and hostel staff and groups

These three groupings should function as three different groups and each has its own specific tasks and functioning.  The most important characteristic of these staff groups is that they play a support role in regard to committees or boards mentioned in paragraph 6.4.6.2. Recommended examples of these are as follows:

- administrative representation on the academic management of the school for the sake of computer administration, prize-giving committee and SMT;

- terrain staff representation on the extra-mural committees and prize-giving;

- hostel representation on the extra-mural committees and SMT.

These examples of committees or boards play an important role in the effective management of the school.

### 6.3.7.4  Value of groups

It is recommended that group functioning in schools should have the following objectives:

- leadership development
- development of planning skills
- orderly work processes
- acceptance of responsibility by group members
- delegation of responsibility (cf. 3.8.3).

### 6.3.7.5  General guidelines regarding group functioning

The following guidelines are recommended if school principals want to utilize the full potential of group functioning:

- Groups should be representative of the purpose for which they were created.

- Groups should not be too large, because it hinders the functioning – groups with a membership of five to seven are recommended (cf. 3.8.5.1).

- The SMT may appoint groups to ensure effective group formation – but all interested parties should be considered.

- The group may appoint their own leadership – the SMT can, for instance, facilitate the leadership of groups by appointing as leaders of the group those people who tend to disappear easily within a group (cf. 3.8.5.1).

- Formal functioning of groups ensure orderly planning, decision-making and execution (cf. 3.8.5.1).

- The group must be aware of its task and therefore of what should be achieved (cf. 3.8.5.1).

- Fully minuted meetings of the group will contribute to effective functioning and can also be used for future planning.

- Structured work division should take place within the group to ensure that all group members are actively involved in group activities.

- Interim reporting to the school principal should be in writing to ensure that the school principal does not have to depend on memory regarding the progress made as far as the activities of the group is concerned.

- The group must be kept on course by the involvement and/or intervention of the school principal.

The school principal is seen as the "common denominator" in the functioning of groups within the school. This hands-on approach can ensure effective groups within the school. The involvement of the school principal can entail physical presence, constitution of groups, reporting by groups and follow-up of reporting.

Because of the complex nature of the HRM task of the school principal he/she can act far more effectively by utilizing the benefits of groups and their functioning and by empowering group functioning.

## 6.3.8  Labour relations

The value of good labour relations in its many and varied facets must be handled and managed by the school principal in a professional way, so that the school will run smoothly. The school principal must ensure that staff members are treated fairly within the guidelines of the law.

### 6.3.8.1  Unions

Unions have a determining influence on the functioning of schools (cf. 3.9.2). School principals need to acknowledge the role of unions and also acknowledge them as HR managers. If the school principal take the following recommendations into consideration, it would facilitate the HRM task in terms of unions.

- View union representatives as partners and not as the enemy – the stronger the partnership, the fewer problems are experienced by staff.

- Respect the role of the school's own union representatives.

- Do not prevent union representatives from fulfilling their union duties in any way.

- Encourage union representatives to present staff problems in writing.

- Start a union committee and meet regularly with this committee in order to handle any problems as they arise quickly.

- Join all unions represented by members of staff in order to stay up to date with all matters regarding the functioning of unions (this is allowed by law). (Roberson, Personal interview: 2 October 2003).

- Be up to date as to which unions are representative of members of staff at the school.

- School principals must reserve their own union jacket and take care not to give preference to one union at the expense of another. Unions must receive fair and equal treatment.

- Obtain all possible information regarding the union and the union's staff (representatives) in order to be prepared in regard to the staff member(s) with whom negotiations need to be undertaken.

- Receive representatives of unions visiting the schools courteously and professionally.

- Administrate negotiations in terms of proper record-keeping.

- Decide beforehand who is to attend the negotiations from the school's side – witnesses are very important.

- Facilitate dialogue and negotiations in a calm and professional manner by the school principal. Remember that the union representative is still a visitor to the school and therefore a guest of the school.

- Make an effort to obtain as much information during the dialogue with the union representative, but don't be in a hurry to establish the position of the school without doing proper research in regard to the situation. Rather make another appointment.

- Successful negotiations within the school are determined by the school principal's professional handling of the situation.

School principals need to understand that the role of the unions cannot be wished away and therefore all matters regarding unions need to be handled with the greatest of care.

## 6.3.8.2 Grievance procedure

The grievance procedure provides employees with the opportunity to address aspects which they find problematic within the framework of their working relationships by voicing a grievance. It is recommended that school principals will address grievances, regardless of how inconsequential they might seem to be, as this could escalate into serious problems regarding labour relations (cf. 3.9.4.2).

It is recommended that school principals engage in an in-depth study of the following:

- Define what a grievance is, as described in the Employment of Educators Act, 76 of 1998 9(2)(2.1) (Republic of South Africa, 1999) and the Public Service Act, 46 of 1997 as described in Government Gazette No. 25209 (2003:3) (Republic of South Africa, 2003) (cf. 3.9.4.1).

- Study the purpose of grievance procedure according to Government Gazette No. 25209 (2003:4) (Republic of South Africa, 2003), through which an effort is made to handle grievances speedily and without bias in order to promote healthy labour relations and solving grievances at the lowest possible level (cf. 3.9.4.2).

- Study the management of grievances according to the Public Service Commission Act, 46 of 1997 as it appears in Government Gazette No. 25209 (2003:4) (Republic of South Africa, 2003).

- Manage grievances of educators according to the Employment of Educators Act, 76 of 1998 (cf. 3.9.4.4).

- Handle grievances according to Figure 6.6, which gives a summary of oral and written grievances (cf. Figure 6.6).

- Study grievance procedures and manage this process, taking into consideration legal requirements, in order to prevent grievances degenerating into disputes.

Figure 6.6 gives a schematic representation of the management of grievances.

**Figure 6.6: Schematic representation of grievance management**

| | |
|---|---|
| **Oral Grievance** | |
| Registration of grievance | • Completes Form A of grievance form<br>• Within 90 days<br>• Representative<br>      - co-worker<br>      - recognised worker's organisation<br>• Process is recorded |
| School principal hears parties | • Together or separate<br>• Audi Alteram Partem applies |
| School principal delivers sanction | • Does not have to be given immediately<br>• Complete Form C if sanction is accepted |
| IF SCHOOL PRINCIPAL'S SANCTION IS NOT ACCEPTED | |
| **Written Grievance** | |
| Registration of grievance | • Complete Form B<br>• Within 90 days<br>• Can have representation |
| School principal further investigates case | • Can, for example, call witnesses |
| School principal delivers sanction | • Does not need to do it immediately<br>• Complete Form C (if sanction is accepted) |
| IF SCHOOL PRINCIPAL'S SANCTION IS NOT ACCEPTED | **SGB APPOINTMENTS**<br>• SGB determines own grievance procedure<br>• With non-acceptance of sanction employer can turn to CCMA |
| Refer to SMD for handling of case | |

(Government Gazette No 25209, 2003:3) (Republic of South Africa, 2003)

### 6.3.8.3  Discipline regarding staff in schools

### (a)  Introduction

It is recommended that discipline in school context must aim at creating a situation within which transgression is not made and where avoidance of conflict occurs, thereby ensuring good labour relations (cf. 3.9.5.1 & 3.9.5.2). The school principal has a very responsible position, but also a very difficult task in regard to the disciplining of staff of the school. The school principal must manage this process but he/she is not the employer. The various staff categories, namely educators and non-educators as well as SGB appointments are handled differently.

### (b)  Approach to discipline

It is recommended that school principals must take responsibility for and lead the school staff in such a way that disciplinary action against staff would not be necessary (preventative discipline) (cf. 3.9.5.3(b)). Discipline, if it has to lead to this, must therefore be progressive in nature. Theoretically progressive discipline can be divided into the following steps:

- Oral warning and counseling;
- Written warnings;
- Final warning;
- Discharge (cf. 3.15.5.3(d)).

The basic disciplinary procedures (steps) as indicated in LRA are explained as follows by Butterworths Labour Relations Library (2000b:13):

- Misconduct
- Informal advice and correction
- Disciplinary counseling
- Warnings
- Disciplinary inquiry
- Termination
- External dispute resolution procedures

These seven steps are part of the recommended disciplinary process for educators and non-educators as summarized in Figure 6.7.

**Figure 6.7   Disciplinary procedures for educators and non-educators**

| INFORMAL DISCIPLINARY PROCEDURES BY SCHOOL PRINCIPALS | |
|---|---|
| Informal advice and correction | • Process internal and informal<br>• No record is kept of process |
| Counseling | • employee is informed of misconduct<br>• give employee opportunity to respond<br>• consult with employee<br>• method to remedy conduct<br>• implement decision |
| Verbal warning | Educators<br>• convene meeting with educator<br>• educator to be represented by union representative based at school<br>• reasons for initiation of process given<br>• counsel or issue verbal or written warning(s)<br>• warning valid for 6 months (to be removed)<br>• no appeal allowed – only objection<br>• objection filed on personal file with sanction |
| Written warnings | |
| Final warning | Non-educators (Public servants)<br>• only form of hearing not necessary before using of progressive warnings<br>• allow meeting with employee<br>• employee represented by union representative<br>• case of employee to be stated<br>• warnings valid for six months (to be removed)<br>• appeal allowed against finding |

**SCHOOL PRINCIPAL'S ROLE ENDS HERE**

**FORMAL DISCIPLINARY PROCEDURE FSDoE**

| | |
|---|---|
| Fines, demotion and suspension | • Disciplinary enquiry required |
| Dismissal | • Disciplinary enquiry required |

(SAOU, 2002:17 & 25).

**(v) Composition of disciplinary hearings in schools**

The various recommended role players during the disciplinary hearing are identified in Figure 6.8

**Figure 6.8: Role players in disciplinary hearings**

| CHAIRPERSON | → | • Chairperson = school principal<br><br>Departmentally appointed educators and non-educators<br><br>• Chairperson = appointed by SGB for SGB appointments |
| INITIATOR | → | • Prosecutor<br>• Departmental appointments: somebody from school<br>• SGB appointments: appointed by SGB |
| ACCUSED | → | • Person or persons accused of a certain action |
| UNION REPRESENTATIVE | → | • Educators are represented by educators' union representative based at the school<br>• Non-educators in public service recommend to be represented by union representative<br>• All SGB appointments – own choice |
| WITNESSES | → | • Initiator witnesses<br>• Defence witnesses |
| INTERPRETER | → | • Necessary if the hearing doesn't take place in the mother tongue of the accused |
| SECRETARY | → | • Carefully record meeting |

(Fabbriciani, s.a.:s.a.).

### (vii) Progression of the informal disciplinary hearing

The recommended progression of the informal disciplinary meeting for educators and non-educators who are in the employment of the Education Department and Public Service respectively, are represented in Figure 6.9.

**Figure 6.9:   Progression of the informal disciplinary hearing**

INTRODUCTION – Chairperson

CHARGES PRESENTED - Initiator

OPPORTUNITY TO PLEA - Accused

**NOT A GUILTY PLEA**

PRESENT CASE - Initiator

WITNESS EVIDENCE IN CHIEF - Initiator

CROSS-EXAMINATION – Union representative

RE-EXAMINATION – Initiator (if necessary)

PRESENT CASE - Defence

WITNESS EVIDENCE IN CHIEF (Defence)

CROSS-EXAMINATION (Initiator)

RE-EXAMINATION – Defence (if necessary)

CLOSING ARGUMENTS - Defence

CLOSING ARGUMENTS - Initiator

FINDING - Chairperson

**PLEA OF GUILTY**

MITIGATING – Representative of accused

AGGRAVATING - Initiator

SANCTION - Chairperson

RIGHT TO APPEAL

Educators

Non-educators

Lodge objection No appeal

May appeal

```
┌─────────────────────────────────────────┐
│  MITIGATING CIRCUMSTANCES - Defence     │
└─────────────────────────────────────────┘
                  │
                  ▼
┌─────────────────────────────────────────┐         ┌──────────────────────────────┐
│  AGGRAVATING CIRCUMSTANCES -            │         │  SGB APPOINTMENTS            │
│  Initiator                              │         │                              │
└─────────────────────────────────────────┘         │  • SGB management process    │
                  │                                  │                              │
                  ▼                                  │  • Labour law also applies   │
┌─────────────────────────────────────────┐         │                              │
│  SANCTION - Chairperson                 │         │  • Accused that has been     │
└─────────────────────────────────────────┘         │    found guilty may appeal to│
                  │                                  │    CCMA.                     │
                  ▼                                  └──────────────────────────────┘
┌─────────────────────────────────────────┐
│  RIGHT TO APPEAL - Chairperson          │
└─────────────────────────────────────────┘
         ╱                    ╲
        ▼                      ▼
┌──────────────┐      ┌──────────────┐
│ Education    │      │ Non-educators│
│ staff        │      │              │
└──────────────┘      └──────────────┘
        │                      │
        ▼                      ▼
┌──────────────┐      ┌──────────────┐
│ Lodge        │      │ May appeal   │
│ objection    │      │              │
│ No appeal    │      │              │
└──────────────┘      └──────────────┘
```

(Fabbriciani & Oliver, s.a.:s.a.)

### 6.3.8.4  Summary

Disciplinary action and procedures within schools is a complex legal process that must be handled absolutely correctly. The disciplinary processes undertaken on a formal basis for educators and staff in the Public Service, become the responsibility of the employer and not of the school principal. School principals must see that they are well equipped for the management of this process.

## 6.3.9  Health and safety management

### 6.3.9.1  Introduction

Health and safety management as HRM task of the school principal entails responsibility management of the health and safety circumstances within which staff must fulfil their daily task and legal action could also flow from this. The SGB certainly also has a responsibility, but this responsibility is normally left to the school principal for management (cf. 3.10.1).

The discussion of and recommendations regarding this aspect will take place against the background of the school principal's creation of safe and healthy conditions for the staff of the school. This includes the total school property, including sports facilities, vehicles and equipment (cf. 3.10.1).

### 6.3.9.2  Health and safety committee

Every school should have a health and safety committee which actively works towards the creation of a safe and healthy workplace for staff (cf. 4.3.4.27). This committee should be comprised in such a way that it is representative of all role players in the school. The successful functioning of the health and safety committee will be influenced by the involvement of the school principal who should play an active, leading role in the committee.

### (i)  Composition of the health and safety committee

It is recommended that a representative health and safety committee should have the following members:

- school principal
- deputy principal or head of department (second in command of the school)
- educator representative
- member of the SGB
- laboratory representative (representing all laboratories)
- terrain manager (or person in charge of terrain)
- person managing school emergency plan
- pre-primary representative (if applicable)
- hostel warden (if applicable)
- hostel household supervisor (matron) (if applicable)

It is further recommended that the school principal should be the chairperson of the committee and that the head safety officer of the school be appointed from the committee.

### (ii)  Functioning of the health and safety committee

Recommendations in regard to the functioning of the heath and safety committee are as follows:

- Members of the committee should identify themselves with the stipulations of Occupational Health and Safety Act, 85 of 1993. An applicable training course specifically aimed at a school situation can be arranged (cf. 4.3.4.28).

- All members of the committee should study the following sections of the above-mentioned Act regarding health and safety committees:
  - ➤ Section 18:  functions of health and safety representatives
  - ➤ Section 19:  health and safety representatives
  - ➤ Section 20:  functions of health and safety committees (cf. 4.3.4.31).

- Quarterly committee meetings of the total committee should take place.

- The committee should function in sub-committees, meeting on their own and making recommendations to the overall health and safety committee.

- Regular inspections should be done and all inspection reports must be kept in safety in writing.

- One person should represent various laboratories and workshops.

- All meetings of sub-committees must be properly minuted and these minutes must be presented to the health and safety committee in the form of reports.

- A complete report must also be presented to the SGB on a quarterly basis.

- The committee must market health and safety at the school and must establish it as second nature with staff members (cf. 3.10.4).

### 6.3.9.3  Incorporation of health and safety management at schools

The safety committee must consider the various buildings, terrain and other potentially dangerous situations with reference to health and safety management and then draw up a checklist that could serve as a guideline in managing potential health and safety

threats in the school situation. Appendixes J, K, L and M are recommended to be used by school principals as guidelines in doing inspections in schools in order to ensure a healthy and safe working environment. These checklists are made up of the following:

- A checklist (Appendix J) used as a general questionnaire regarding the health and safety situation in schools.

- Health management checklist (Appendix K) used to assesses the availability of policies and structures to facilitate health management, which includes physical and mental health in schools.

- A checklist (Appendix L) to manage safety in schools.

- A report (Appendix M) on accidents and injuries that could be used immediately to serve as a vital resource of information when official reports must be completed.

Reference will now be made to recommendations regarding the constitution of checklists regarding the management of health and safety in schools.

The purpose of this checklist is to inspect the total school set-up, with reference to the terrain, buildings and the hostel (if applicable) in order to ensure a healthy and safe school situation.

### 6.3.9.4 Recommendations on the use of a checklist to assess the general situation of health and safety management in schools

It is recommended that a general inquiry regarding health and safety management is done on a continuous basis in schools and that a checklist (Appendix J) be used to facilitate this process. The checklist, in the form of a questionnaire, should be used to determine whether or not:

- the school complies with legal obligations regarding employment;

- the school possesses the necessary legislature regarding health and safety management;

- the school has a Health and Safety Committee;

- the required toilet and tearoom facilities exist for all categories of staff.

It is further recommended that the information gathered through the checklist be used to make recommendations regarding health and safety management to the SGB and the FSDoE. The assessment of the general position of the school with regard to health and safety management should be used by school principals as a point of departure to ensure better health and safety management.

### 6.3.9.5  Recommendations regarding the use of a checklist to facilitate effective health management at schools

It is recommended that a checklist (Appendix K) be used to facilitate effective health management in schools. The checklist should be used to determine whether or not:

- the school has the necessary policies regarding the management of Aids, substance abuse and first aid;

- the school has a wellness programme to manage amongst other stress, substance abuse, healthy lifestyle, smoking and information regarding disease;

- health management concentrates on the physical, as well as the mental well-being of staff.

School principals should always manage the work situation in such a way that the health of staff is not put into danger with regard to health conditions at school.

### 6.3.9.6  Recommendations regarding the use of a checklist to facilitate effective safety management in schools

It is recommended that a checklist be compiled to list all possible rooms, equipment and situations in the school that should be inspected for safety.  Appendix L serves as an example of such a checklist.  It should be adjusted to suit the unique situation of a specific school.

- add items or aspects unique to the situation or room, etc.;

- complete a checklist for every classroom, office and storeroom, etc.;

- carry out follow-up inspections;

- compile written reports regarding the information obtained during inspections.

It is essential that school principals regard school safety as a priority in order to ensure a safe working environment for staff.

**6.3.9.7 Recommendations regarding record-keeping with reference to accidents or injuries**

It is recommended that a document be drawn up which can be used to report accidents or injuries (Appendix M). This document should be used as follows:

- It should be applicable for all vehicles, rooms and meetings at the school or away from the school.

- Staff should be trained in completing this form in a crisis situation, as it may happen that valuable information is lost which could have been critically important to the completion of a report or to serve as evidence.

- This document should collect, amongst others, the following information:
  - ➢ time
  - ➢ date
  - ➢ description of events
  - ➢ names of witnesses
  - ➢ registration numbers of vehicles
  - ➢ action undertaken
  - ➢ telephone calls made

### 6.3.9.8 Facilities and equipment to be managed regarding health and safety management in schools

It is recommended that the following facilities and equipment be included in the health and safety management plan of all schools:

**(a) School buildings**

- Classrooms
- School hall
- Storerooms (also terrain manager's stores)
- Dressing rooms
- Office block
- Workers' quarters
- Workshops
- Laboratories
- Passages
- Buildings maintenance
- Gymnasium hall
- School gymnasium

**(b) Hostel**

- Bedrooms of learners
- Flats of staff
- Study and dining hall
- Kitchen
- Stores
- Staff quarters
- Hostel terrain

**(c) School terrain**

- Fire hoses and extinguishers
- Fences and gates
- Drains and storm water covers
- Gutters

- Playground equipment
- Plants

**(d) Swimming pool**
- Fencing and gates
- Warning boards
- Storage of chemicals
- Transporting of chemicals
- Training of workers
- Life jackets and other protective wear
- Changing rooms
- Pool structure (e.g. tiles at sides of pool)

**(e) Vehicles**
- Roadworthiness (daily first parade)
- Fire extinguishers
- Medical cases
- Valid public driver's permits

**(f) Equipment**
- Garden and maintenance equipment
  - ladders
  - garden tools
  - lawnmower
  - edge cutters
  - welding apparatus
  - electrical equipment (e.g. drills)

To conclude, it is recommended that specialised equipment be inspected and maintained by experts.

### 6.3.9.9 Emergency plan

It is recommended that every school should draft an emergency plan. The plan should be practised regularly and address, among others, the following issues:

- Training of staff and learners to react correctly in emergency situations. This should include training in the use of fire extinguishers.

- The servicing, storage, displaying and safe usage of equipment like fire extinguishers and teaching and laboratory equipment.

This emergency plan should be accompanied by written reports regarding emergency plan practices and actual action taken during problem situations.

### 6.3.9.10 Security

A safe and secure environment is very important to all employers. It is therefore recommended that school principals ensure that:

- educators and non-educators can perform their duties without being in danger;

- the necessary precautions be taken to keep intruders at bay;

- staff working with money takings and banking cash be properly protected;

- through proper security schools become places where positive learning and education can take place (cf. 3.10.5).

### 6.3.9.11 Conclusion

There will be a definite financial implication to getting and keeping the health and safety management of schools up to date. It is therefore recommended that health and safety management is included as a cost item in the annual capital and recurrence expenditure budget of schools.

## 6.3.10 Human Resources Administration

HR administration is a very big task, but is the management responsibility of the school principal. Recommendations regarding HR administration are as follows:

### 6.3.10.1 Departmental documentation

It is recommended that, in accordance with Departmental policy, every school principal should prepare documentation that should be at hand in every situation.

### 6.3.10.2  Filing

The following is recommended in regard to filing of documentation:

- Every member of staff should have a personal file which provides for the following sections (cf. 3.11.1):
  - ➢ leave forms
  - ➢ class visits
  - ➢ disciplinary matters
  - ➢ personal information and documentation
  - ➢ training courses
  - ➢ special achievements
  - ➢ general documentation
  - ➢ IQMS / PMDS

- Place a copy of every document affecting that particular staff member on file, even if it means extra copying of documents (cf. 3.11.2).

- Ensure the security of documents that are on the personal files (cf. 3.11.2).

- Make personal entries based on personal observation and communication on the files (cf. 3.11.2).

- Make an index for every separate file and enter all documents in the index for safety returns.

HR administration is a complex task and the school principal should train staff accordingly and create structures for the proper administration of the HR component of the school.

## 6.4  CONCLUDING REMARKS

This HRM model consists of recommended guidelines only and serves to provide a broad framework that must be considered in context with the existing literature (cf. Chapters 2 and 3). Thereafter every school principal should draw up a personalized HRM manual for the specific school that could be used as a policy document and reference guide. In the following chapter attention will be given to making the summary, findings and recommendations of this study.

# CHAPTER 7

# SUMMARY, FINDINGS AND RECOMMENDATIONS

## 7.1 INTRODUCTION

The primary goal of this study was the establishment of an HRM model that can be used by school principals in the execution of their HRM task. This study was undertaken by doing a literature study as well as empirical research. Therefore certain findings and recommendations can be made, taking into consideration the literature study and the empirical research results.

In this chapter a summary of the research will firstly be given. Secondly, findings will be discussed in regard to the research goals, as set in Chapter 1, by referring to the literature study done in Chapters 2 and 3, also taking into consideration the empirical research done in Chapters 4 and 5 and the HRM model for school principals in Chapter 6. Thirdly, recommendations will be made regarding the literature study, empirical research and HRM model.

## 7.2 SUMMARY

**Chapter 1** gives an introductory description and orientation of the study that is undertaken by referring in general to the complex management task of the school principal and, more specifically, focusing on the HRM task of the school principal. In regard to the problem statement, the problem questions are formulated (cf. 1.1):

Question 1 is handled by means of a literature study in Chapters 2 and 3, whilst answers to question 2 are investigated at the hand of empirical research in Chapter 4 and question 3 in Chapter 5. In Chapter 6 the HRM model is represented to school principals as the answer to question 4, with question 5 being answered in Chapter 7 by means of recommendations and findings.

Research outcomes are formulated with reference to the problem questions to structure the research.

The rest of Chapter 1 is devoted to the research flow, namely the literature study (cf. 1.3.1) and the empirical research (cf. 1.3.2).

In **Chapter 2** emphasis is placed on a description of HRM as management task of the school principal, taking the view of HRM functioning within the organisational climate and structure with the role played by HRM in big and small organisations, with the school viewed as a small organisation (cf. 2.2; 2.3; 2.4 & 2.5). Brief reference is also made to the constitution of the HR directorate of the FSDoE (cf. 2.6). The HRM task of the school principal is shown in Figure 2.3 in regard to its two main components, namely HR provision and HR maintenance (cf. 2.7). HR provision is further described in Chapter 2 by referring to the various HRM tasks according to Figure 2.3 (cf. 2.8). The HRM tasks handled by the school principal as part of HR provisioning in this chapter, are as follows (cf. 2.7 & 2.8):

- Human resources planning
- Recruitment
- Selection
- Placement
- Induction
- Career management

The school principal plays an important and active role in regard to HR provisioning, especially in regard to the management responsibilities in connection with SGB appointments regarding HRP and recruitment. The indispensable role played by the school principal regarding selection, placement, induction and career management is also highlighted in Chapter 2.

In **Chapter 3** the role of the school principal in regard to HR maintenance is described by referring to the following HRM tasks (cf. 2.7):

- Training and development
- Performance appraisal
- Compensation management
- Motivation
- Quality of work life (QWL)
- Leadership

- Groups in organisations
- Labour relations
- Health and safety
- HR administration

From the literature study in this chapter it is clearly observable that the school principal plays an extremely critical role in regard to the eventual success of the school and the education and teaching task thereof in the execution of the HRM tasks described in Chapter 3.

In **Chapter 4** reference is made to the presentation, analysis and interpretation of research results obtained by the investigation undertaken amongst school principals in the Free State Province regarding their HRM task and the practical implementation thereof in the execution of their daily tasks in regard to HRM (cf. 4.3). The Chapter refers in introductory fashion to the purpose of the empirical research and the instrument of measurement used in obtaining the research results (cf. 4.2.1 & 4.2.2). The pilot study (cf. 4.2.3), distribution of the questionnaire as instrument of measurement (cf. 4.2.4), population (cf. 4.2.5), sample (cf. 4.2.6) and the response rate (cf. 4.2.7) are also described in full. The compilation of data (cf. 4.2.8) and the reliability and validity of the research (cf. 4.2.9 & 4.2.10) are also described in full. The analysis and interpretation of the research results (cf. 4.3) are represented according to frequency tables (cf. 4.3) according to the questionnaire items in order to table the responses of respondents regarding their HRM task.

In **Chapter 5** the presentation, analysis and interpretation of the research results are continued. The training needs and the importance of aspects of the HRM task of school principals are compared throughout the Free State Province and according to education districts (cf. 5.2).  It is followed by comparing training needs and the importance of HRM tasks in subgroups with one another (cf. 5.3 & 5.4). The chapter is completed by comparing the training needs and importance of HRM tasks in education districts with other education districts (cf. 5.5).

In **Chapter 6** the HRM model to be used by school principals as guideline in the execution of their daily HRM task is described. This model is based on the literature study and empirical research undertaken in this study.

The findings of this study will now be presented in regard to the research questions and research outcomes that are put forward in Chapter 1 (cf. 1.1 & 1.2).

## 7.3  FINDINGS

### 7.3.1  Findings with regard to the first problem question and aim of this study: What does HR provision and HR maintenance as the task of school principals in the Free State Province entail?

- The management task of the school principal has undergone a metamorphosis where the school principal is viewed as an education manager who must be in possession of particular leadership and management skills of which HRM is a complex but necessary task that will determine the eventual success of the school in terms of effective education and training (cf. 1.1 & 2.1).

- From the definitions and descriptions of HRM it can be seen that every school has a very clear objective in terms of education and training, but that this can only be achieved if the role of the school principal is recognised and seen as a benefit without which the school will not be able to function and that the staff as individuals in their own right must be treated with dignity and respect (cf. 2.2; 2.3; 2.4.1 & 2.4.2).

- A school's HRM falls into the category where HRM is managed in smaller organisations.  School principals should, however, guard against the possibility that the problematic aspects regarding HRM in small organisations are not imputed to their schools. The school principal plays a very important role as HR manager of the school (cf. 2.5.1).

- The HRM task of the school principal according to Figure 2.3 is very complex and wide and the role of the school principal seems to be one of active involvement with staff. The great pressure on the school principal regarding HRM definitely has to do with the extensive task of the school principal as HR manager and should be viewed against the background of the total management task of the school principal (cf. 2.7 & 1.1).

- Although HR forecasting is largely a Departmental function made on national and provincial level by means of statistical analysis, a school principal with vision and intuition for education will realise that this function needs to be undertaken on grassroots level, in order to anticipate possible staff shortages so as to actualise the goal of the school in regard to education and training (cf. 2.8.2.1; 2.8.2.2 & 2.8.2.3).

- Personal involvement of staff in the undertaking of job analysis is essential so that they can accept the process and it can lead to their empowerment (cf. 2.8.3.2).

- Agreement of the staff in regard to their various job descriptions (cf. 2.8.4.2) is important. Once again this process is invaluable if the incumbents of posts are involved in this process. A transparent process with mutual acceptance is necessary to achieve the school's goal.

- By means of a process of job design, jobs and tasks must lead to effective functioning of the school and thereby ensure job satisfaction for the school staff (cf. 2.8.6.1). This process can, by means of job redesign, be extended to endeavour to make staff's jobs more pleasant and to establish greater challenges (cf. 2.8.6.2 & 2.8.6.3).

- Legislation has a big influence on employment practices in schools (cf. 2.8.7).

- The success of a school and any organisation for that matter is directly influenced by successful recruitment of potential employees, because staff can give one school an advantage over another school (cf. 2.8.8.2).

- The image of the school has a great influence on the recruitment of possible employees. Therefore the school must be marketed with a good name and as a pleasant place of employment where job security is of great importance (cf. 2.8.8.2).

- School principals and SGB's fulfil a critical role regarding the selection process of schools (cf. 2.8.9.2 & 2.8.9.3).

- It must be ensured that Departmental requirements and regulations are adhered to at all times of the selection process in regard to the filling of Departmental vacancies at schools (cf. 2.8.9.4 & 2.8.9.6(c)).

- The structure of the interview as part of the selection process must be properly planned and executed (cf. 2.8.9.6(b)(ii)).

- School principals and SGB's must ensure that the employment of SGB appointments are done professionally and according to legal requirements (cf. 2.8.9.6(c)).

- Induction is an ongoing process that not only leads newly appointed employees, but is also applicable to internal promotions, staff transferred from one department to another and present staff members that need to be transformed in regard to the functioning of the school (cf. 2.8.11.5).

- Newly appointed staff who have undergone a proper induction process are quickly productive, feel at home in the new working conditions, form a positive attitude towards the school and establish good relationships with other staff members, which then leads to the new staff feeling more at ease at an earlier point in time, experiencing less stress and anxiety. A lower labour turnover is the result of a professionally managed induction process (cf. 2.8.11.2 & 2.8.11.3).

- Much emphasis is placed in literature on the induction of educators, with the induction of non-educators being barely mentioned. The school

principal as HR manager must ensure that all categories of staff are exposed to a properly structured induction process (cf. 2.8.11.7 & 2.3).

- Active involvement in the planning and management of these employee's careers is very important and the school should make the best possible use of these people. It is, however, important that the employee is actively involved in the process (cf. 2.8.12.1 & 2.8.12.3).

- It will serve no purpose to recruit and appoint the best possible staff and then not to look after them properly (cf. 3.1).

- There should be a continuous promotion of learning in the school with all staff categories, because it leads to goal achievement for the school and therefore the training and development of staff should be seen as an investment and not an expense (cf. 3.2.2.1 & 3.2.2.2).

- The needs of the school should be properly determined and then a training and development programme for staff should be developed to answer these needs (cf. 3.2.5.3).

- Training and development of the management of schools in terms of present or future managers in regard to the school itself is very important in improving the performance of people in present management positions and in the development of future managers of the school (cf. 3.2.8).

- Measurement of the staff's performance and the comparison between actual performance and expected performance with the expected results is an important, never-ending process in determining the person's contribution to the functioning of the school. An important ingredient of the measurement of staff performance is still a personal interview used to give feedback regarding the person's performance seen against the background that 80% of staff believe that their performance is above average, while only about 50% of staff actually achieve this expectation (cf. 3.3.1 & 3.3.8.1).

- Staff performance must be managed in such a way that performance goals are reached (cf. 3.3.9.1).

- Although compensation influences job performance and motivation of employees, educators give their best because they see their education and teaching task as very important and place the interests of the learners ahead of all else (cf. 3.4.3),

- The school principal and education leader must possess the ability to motivate staff (cf. 3.5.1).

- Motivation has a direct influence on the job performance of staff, but the fact should also be taken into consideration that low job performance does not always result from the absence of motivation. External factors like working conditions and the absence of the necessary skills to be able to complete the task also have a great influence on low job performance. In education class sizes and disciplinary problems can, for instance, also play a big role (cf. 3.5.4).

- Employee performance and QWL go hand in hand and therefore the school principal must ensure that staff experience satisfaction and fulfilment in their work situation (cf. 3.6.5). The needs of staff must be addressed and the staff must experience the situation of the school caring for them (cf. 3.6.1).

- The school principal plays a decisive role in the functioning of the school and is a central figure in regard to leadership of the school (cf. 3.7.1).

- Leadership in the school must be based on the mutual influencing between the school principal and the staff towards each other in order to establish a group feeling amongst staff members (cf. 3.7.2).

- Groups and group formation play a critical role in the management of schools in being able to achieve the complex task compilation in schools successfully (cf. 3.8.1). The functioning of groups can be used by the

school principal to give staff the opportunity to fill a position of leadership (cf. 3.8.7.5),

- Good labour relations have a great influence on the success of any organization (school). Good human relationships are characterised by the acknowledgment of the role of individuals in the school and fair treatment of everyone at the school (cf. 3.9.1).

- The school principal must recognise the role of unions in the school as place of work and the influential role that it exerts from outside the school on the functioning of the school and in respecting the rights of the staff to unionize (cf. 3.9.2).

- Complaints from staff can lead to grievances if not addressed (cf. 3.9.4).

- Staff must be encouraged by the management of the school to strive towards the standards of the school in order that both the management of the school and the employee will accept mutual responsibility in regard to the standards (rules and regulations) of the school so that disciplinary actions can be avoided at all costs (cf. 3.9.5.1). Staff must therefore be managed in such a way that their behaviour does not lead to disciplinary action. Real disregard of prescriptions should, however, be progressively handled so that there will always be an opportunity for rehabilitation of the problem (cf. 3.9.5.3(b)).

- School principals must keep up to date with policy and procedure regarding disciplinary action (cf. 3.9.5.4).

- A healthy and safe working environment must be ensured for staff by the school principal in order thereby to free staff from health and safety risks (cf. 3.10.1).

- Proper HR administration is necessary in terms of proper record-keeping in order to enable the school principal to make proper decisions on the grounds of good record keeping (cf. 3.11.1).

### 7.3.2 Findings with regard to the second problem question and the aim of this study: How are the HRM tasks of school principals performed in schools in the Free State Province?

- Although 41,8% of respondents in the Free State Province are in possession of an B.Ed. (Honours) qualification, the 20% of respondents in the Free State Province who are in possession of a qualification aimed at HRM is distinctly lower. There should be an overlap between a B.Ed. (Honours) and an HRM qualification, but it seems that this is not sufficiently the case (cf. 4.3.2).

- Respondents (school principals) in the Free State Province seem to be experienced educators with the majority possessing more than 20 years' teaching experience. The vast majority of respondents, however, possess less than 10 years experience as school principals (61,8%) (cf. 4.3.2). School principals are not truly trained and / or prepared for their task as school principals in general and for HRM specifically (cf. 1.1).

- The staff compilation of schools make the HRM task of the school principal very hard, as the school principal as HR manager is responsible for this widespread staff compilation. The HRM task is, however, further complicated by service provisions and the total management of educators that are different in nature, in accordance with the Employment Educators Act, 76 of 1998, and non-educators, in accordance with the Labour Relations Act, 66 of 1995. Cause for concern is that certain schools no longer employ Departmental administrative and terrain staff. This places the school principal under severe pressure as far as his/her general management task is concerned, but also his/her HRM task that need support staff in an administrative capacity (cf. 4.3.3.3; 4.3.5.1 & 6.2.2).

- Schools are seen as small organisations in terms of HRM (cf. 2.5.1) but still 52,1% of responding schools have staff ranging from 26 to 50 staff members. The staff employed at such a school ranges from highly educated professional people to unschooled workers that need to be

approached and managed differently. This makes the size of a school's staff evidently of greater importance (cf. 4.3.3.3 & 4.3.3.4).

- In only 25,7% of participating schools the HRM task of the school principal is managed according to an HRM policy that has been compiled for the school. This has the effect that HRM is managed randomly and in accordance with disorganised documentation (cf. 4.3.4.1). According to 57,9% of respondents their schools possess a staff manual that can be used by staff members. This document has a definite overlap with HRM, but can never serve as HRM policy document (cf. 4.3.4.33). A structured, personalised HRM policy document for each school and a staff manual will ensure professional HRM at schools.

- In the Free State Province a present shortage is experienced in certain subjects, the so-called scarce subjects, as indicated by 47,5% of respondents. A future shortage in certain subjects is foreseen by 54,6% of respondents (cf. 4.3.4.2). Although the indication of a present and future shortage by respondents is not overwhelming, it is clear that there are certain schools experiencing such a shortage and foreseeing it, which means that there are present schools that are not able to undertake their teaching task to its fullest extent. The indication is also that 54,6% of schools where the school principals acted as respondents, will experience problems in future in the provision of quality education in specific subjects like Natural sciences, Mathematics and Accountancy. This places much stress on the school principal as HR manager in obtaining the necessary staff to be able to ensure proper education and training. Very few respondents (4,6%) indicated that they have undertaken on their own initiative a system whereby their SGB's provide school bursaries to enable education students to study in order to solve the problem of a future shortage of educators in specific subjects. This is possibly a strategy aimed at the future in order to ensure sufficient staff provision if it falls within the financial capabilities of the school (cf. 4.3.4.3).

- In 56,4% of schools in the Free State Province there is no present structure regarding induction. The indication is that induction takes place haphazardly in these schools (cf. 4.3.4.12). Most respondents (82,5%) indicated that induction does take place with new appointments at their schools (cf. 4.3.4.13). It seems as if a member of the SMT accepts responsibility for this process in schools in the Free State Province (cf. 4.3.4.14). Induction of the various categories of staff is represented in Figures 7.1 to 7.4.

**Figure 7.1   Induction of educators**
**(N = 280)**



No induction 17,1%
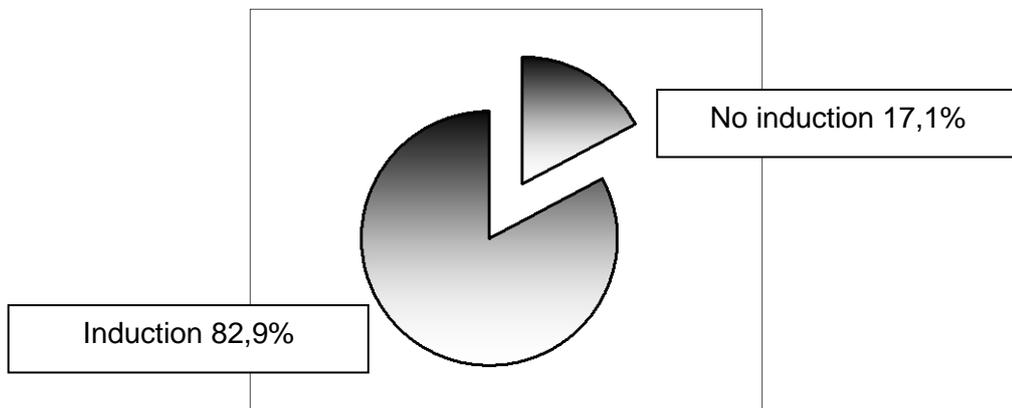
Induction 82,9%

**Figure 7.2   Induction of administrative staff**
**(N = 274)**



No induction 31,7%
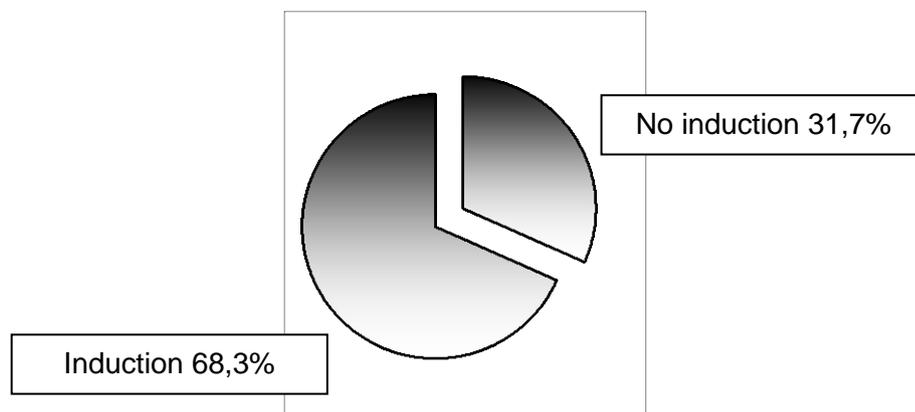
Induction 68,3%

**Figure 7.3   Induction of terrain staff**

**(N = 226)**



Induction 47,8%

No induction 52,2%
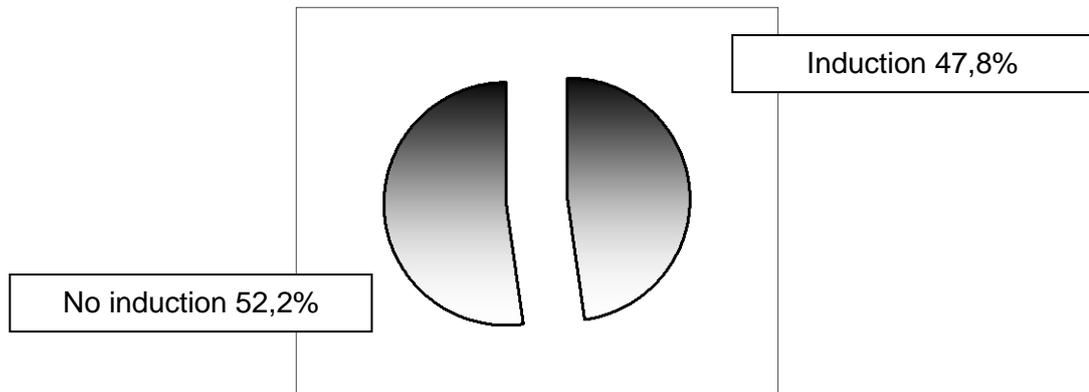
**Figure 7.4   Induction of hostel staff**

**(N = 46)**



Induction 47,8%

No induction 52,2%
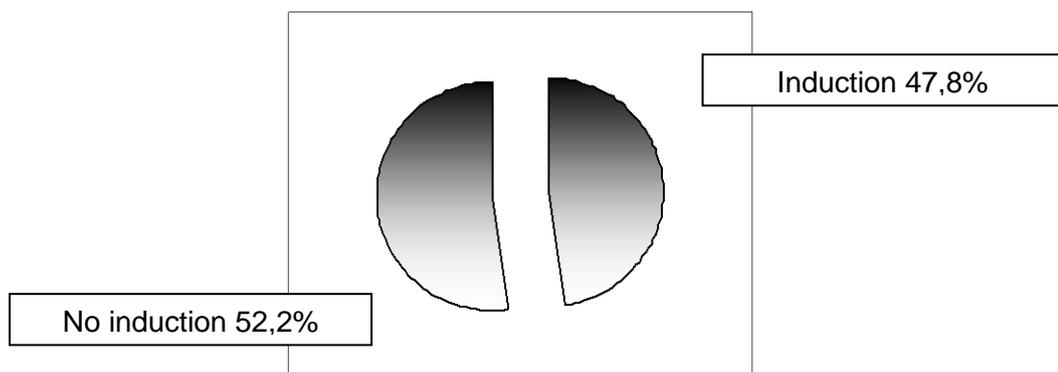
- If the numbers in Table 4.13 are used, which indicate the staff categories at schools, it is very clear that induction of staff does not enjoy a high level of priority. Although educators in 82,9% of cases undergo an induction process, and because of the fact that there is a deterioration in the numbers of other staff categories, the goal should always be 100% (cf. Table 4.28).

- Training and development in schools in the Free State Province, according to respondents, is not a planned, regulated process that takes place in a structured way (cf. 4.3.4.16). The training and development of staff according to a structured policy is indicated in Figures 7.5 to 7.8.

**Figure 7.5   Training and development of school principals**

**(N = 280)**

No training and development policy 18,6%

Training and development policy 81,4%
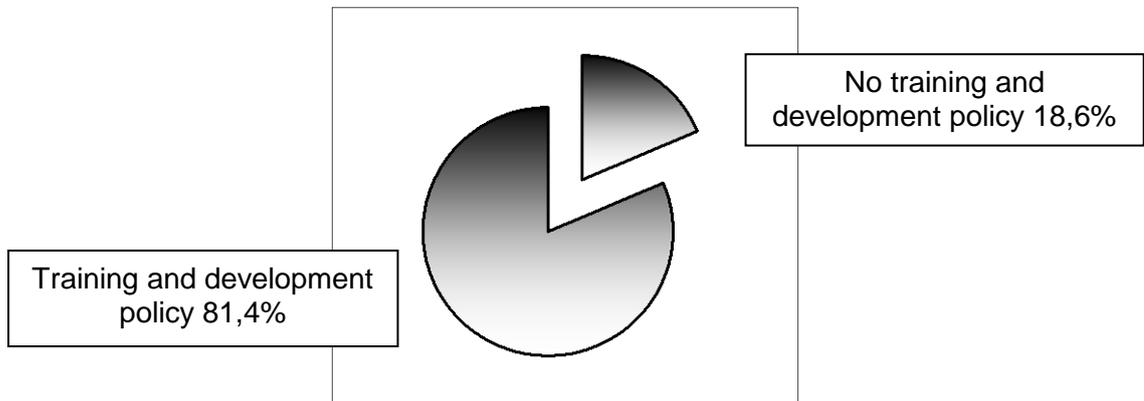
**Figure 7.6   Training and development of SMT's**

**(N = 280)**

Training and development policy 42,1%

No training and development policy 57,9%
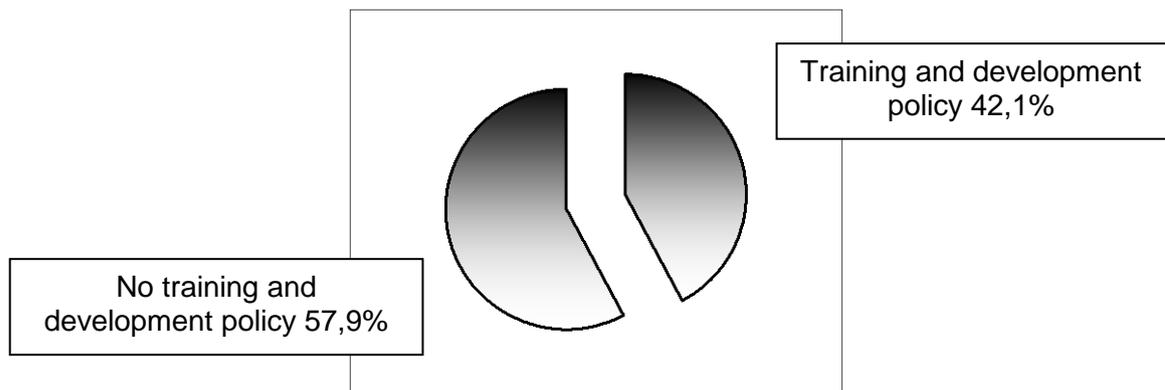
**Figure 7.7   Training and development of educators**

**(N = 280)**

No training and development policy 48,9%

Training and development policy 51,1%
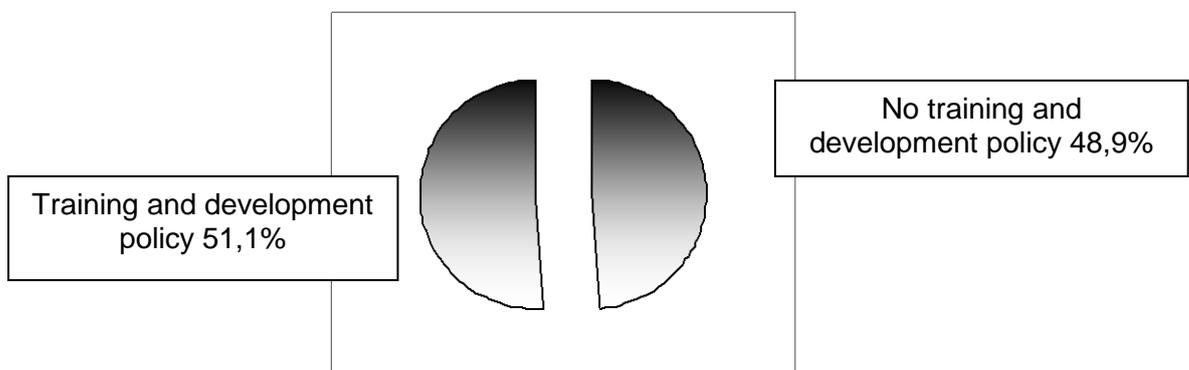
**Figure 7.8   Training and development of non-educators**

**(N = 272)**



Training and development policy 36,0%

No training and development policy 64,0%
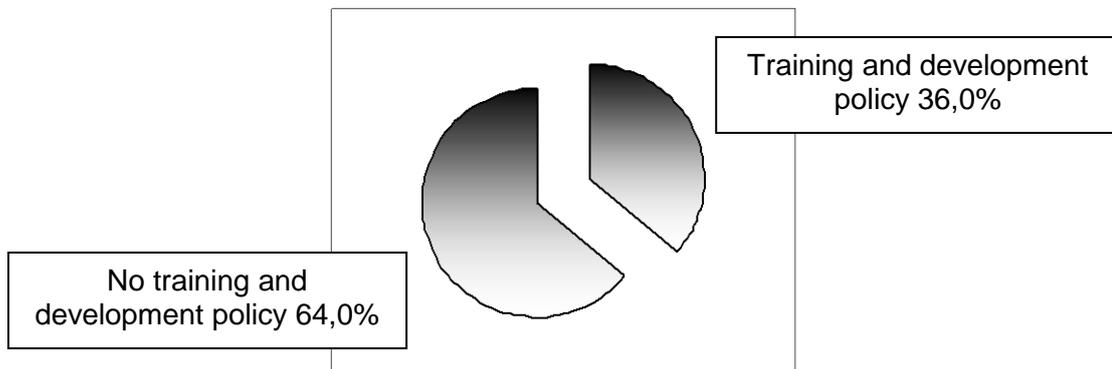
- The training and development of the school principal, who is the manager of the school, is often sadly neglected, with other categories of staff not producing much better results (cf. 4.3.4.16).

- The SGB plays an important role in the management of HRM activity of the school. Respondents indicated that only 37,1% of SGB's undergo training and development for their task in an orderly, structured manner (cf. 4.3.4.18).

- Of the respondents in the Free State Province only 70,7% indicated that they have a SDT in place at their schools, which indicate a disregard of Departmental policy at 29,3% of respondents (cf. 4.3.4.19).  In 62,1% of cases the school principal takes the lead in the functioning of the SDT of the school (cf. 4.3.4.20).

- Motivational sessions for educators are held at 86,4% of schools with a clear decline for non-educators to 56,2% (cf. 4.3.4.21). It seems that much more emphasis is placed on the motivation of educators than on the motivation of non-educators. Motivational sessions are held on a termly basis for both educators and non-educators at most schools (cf. 4.3.4.22). The school principal plays a very important role in the motivation of staff by means of the hosting of motivational sessions (76,4%) in the Free State Province (cf. 4.3.4.23).

- According to 66,1% of respondents staff members have the necessary knowledge regarding the functioning of the grievance procedure in schools (cf. 4.3.4.24).

- School principals and SMT's play a very important role in the management of grievances in schools (cf. 4.3.4.25).

- There seems to be a high level of satisfaction amongst respondents regarding the discipline of all staff categories in regard to the execution of their various tasks and responsibilities (cf. 4.3.4.26).

- Safety committees seem to be in place in 75,4% of schools (cf. 4.3.4.27). Only 46,4% of respondents in the Free State Province were convinced of the fact that their schools adhere to the requirements of the Occupational Health and Safety Act, 85 of 1993 (cf. 4.3.4.28). Respondents further indicated that 55,7% of schools do regular inspections of their terrains, equipment and tools (cf. 4.3.4.29), but only 21,4% do these inspections by means of written record-keeping and proper safekeeping thereof (cf. 4.3.4.30). The availability of the Occupational Health and Safety Act at schools could be confirmed by only 30% of respondents (cf. 4.3.4.31). The conclusion can thus be drawn that there is a great lack in regard to health and safety management in schools. The dangers and threats existing in schools are presently not addressed with care and management, and this could have catastrophical results.

- Many respondents (42,1%) indicated that their schools are not in possession of a staff manual that can be used by staff as a source of reference (cf. 4.3.4.33). The absence of such a document leaves a definite lack for present staff and new appointments in the completion of their daily tasks. It can lead to incorrect behaviour, but also impairs the productive action of staff, because guidance is sought in other places, while it should have been immediately available.

- Only 58,6% of respondents are of the opinion that their staff members are satisfied with their working conditions while 27,1% are unsure (cf. 4.3.4.34).

- According to 61,4% of respondents educators are experiencing career satisfaction while 70,2% of respondents indicated that non-educators experience job satisfaction (cf. 4.3.4.35).

- Dissatisfaction with Departmental salaries seems to be an everyday occurrence for both educators and non-educators with school principals themselves indicating their dissatisfaction with their salaries (cf. 4.3.4.36 & 4.3.4.37).

- School principals definitely need training in HRM with 63,2% of respondents indicating that they don't possess sufficient knowledge to be able to execute their important task in regard to HRM (cf. 4.3.4.38).

- Only 43.9% of respondents are of the opinion that their SMD possess the necessary knowledge to be able to support them in their HRM task, while only 31,4% and 26,1% are of the opinion that the education district office and the Departmental head office have sufficient knowledge of HRM (cf. 4.3.4.39 & 4.3.4.40).

- The vast majority of respondents (91,4%) indicated that the responsibility of the FSDoE is to ensure that school principals are sufficiently trained and developed, although some respondents spontaneously indicated on the questionnaire that the FSDoE should not provide training using only their officials, but rather facilitate the process itself (cf. 4.3.4.41).

- The use of exit-interviews for both educators and non-educators who are leaving the school is seen as an important source of information for the school principal although it is not widely in use (cf. 4.3.4.42).

- PA for non-educators is undertaken by only 25,2% of respondents and for 45,4% of educators who are employed by the SGB, DAS is being

undertaken. Although the two processes are not Departmentally prescribed for SGB appointments, school principals have to give some kind of performance feedback to the SGB and staff and therefore the application of DAS and PA for SGB appointments is imperative, as it would be a uniform method of evaluating Departmental and SGB appointments (cf. 4.3.5.2 & 4.3.5.3).

- According to respondents, the contracting of SGB appointments is handled by school principals in 71,3% of cases (cf. 4.3.5.4). The legal stipulations of such contracts are therefore being handled by a person who generally does not have the necessary legal knowledge or training and also does not possess knowledge regarding the technical handling of such contracting.

- Only 20,6% of respondents indicated that their educators who are employed by the SGB are receiving remuneration equal to that of Departmental scales, with non-educators receiving such remuneration in only 13,1% of cases (cf. 4.3.5.6). Benefits received by SGB appointments in comparison with those received by Departmental staff correspond in only 12,4% of staff in the case of educators and only 8,4% in the case of non-educators (cf. 4.3.5.7). The above-mentioned results do not, however, lead to a great labour turnover in regard to SGB appointments (cf. 4.3.5.8).

## 7.3.3 Findings with regard to the third problem question and aim of this study: What are the training needs of school principals in the Free State Province with regard to HRM?

### 7.3.3.1 Training needs and the importance of HRM tasks compared

**(a) Training needs and the importance of HRM tasks compared in the Free State Province**
- Respondents in the Free State Province's overall mean indicate that there is a definite need of training in regard to HRM (mean = 3,6627) and that the particular HRM tasks are seen by them as important in regard to their HRM task (mean = 4,5053). The difference in the overall mean scans is

statistically significant (P < 0,05), which indicates that the various HRM is seen as important by respondents, but that training is needed. Although there is a training need (mean > 3), respondents do possess a measure of knowledge in regard to their HRM task (cf. Table 5.1).

- The mean scores indicated by the mean scores of respondents in the Free State Province reflect specific training needs and the importance of HRM task is indicated thereby (mean > 3).

- In Table 7.1 the training needs are listed in order of importance of HRM tasks (cf. Table 5.1).

**Table 7.1: Training needs in order of importance of HRM tasks in the Free State Province**

| Training needs | |
|---|---|
| HRM tasks | |
| 1. | Motivational techniques |
| 2. | Training and development of staff |
| 3. | Disciplinary aspects |
| 4. | HR administration |
| 5. | Health and safety management |
| 6. | DAS for educators |
| 7. | Career planning of staff |
| 8. | PA for non-educators |

- Shortlisting and interviews (mean = 2,7143) are not seen as a training need by respondents in the Free State Province (mean < 3), but it is seen as an important HRM task by respondents (mean = 4,5429). This pattern is clearly visible in all education districts (mean < 3), and is consistently placed at the lowest ranking in terms of training required by all respondents in all education districts (cf. Table 5.1).

- The comparison of the training needs with the importance of HRM tasks of school principals is a clear indication of the following: although these particular HRM tasks are viewed as important (mean > 3), the need for training in all cases is significantly smaller than the importance imputed to it by respondents (cf. Table 5.1).

- Although respondents see motivational techniques as a priority in terms of a training need and the importance thereof, HRM tasks like career planning, DAS for educators and PA for non-educators (although these might contribute greatly to the motivation of staff in regard to the interest of staff members) are ranked very low on the priority list (cf. Table 5.1).

**(b)** **Training needs and the importance of the HRM tasks compared in Education Districts**

- Respondents in the various education districts have a training need in regard to their HRM tasks (mean > 3) and furthermore view their HRM tasks as very important (mean > 3). The various overall mean scores in regard to training needs and the importance of the HRM tasks are represented in Table 7.2.

**Table 7.2:** **Overall mean scores with regard to training needs and the importance of the HRM tasks of the school principal in the different education districts**

| Training needs | | | Importance of HRM tasks | | |
|---|---|---|---|---|---|
| Education Districts | mean scores | Rank order | Education Districts | mean scores | Rank order |
| Thabo Mofutsanyana | 3,8172 | 1 | Thabo Mofutsanyana | 4,6020 | 1 |
| Motheo | 3,7014 | 2 | Xhariep | 4,5714 | 2 |
| Xhariep | 3,5979 | 3 | Motheo | 4,4667 | 3 |
| Lejweleputswa | 3,5887 | 4 | Lejweleputswa | 4,4581 | 4 |
| Northern Free State | 3,4367 | 5 | Northern Free State | 4,4289 | 5 |
| Free State Province | 3,6627 | - | Free State Province | 4,5052 | - |

The ranking order of training needs and the importance of the HRM tasks are identical with the Motheo and Xhariep Education Districts the only exemptions.

- The education districts of Thabo Mofutsanyana (mean = 3,8172) and Motheo (mean = 3,7014) have the biggest need for training in HRM. The need for training in those two education districts is higher than the overall need in the Free State Province (mean = 3,6627) (cf. Table 5.1 to 5.6).

- Only two education districts, Thabo Mafutsanyana (mean = 4,6020) and Xhariep (mean = 4,5714) rate the HRM tasks more important than the overall rating of the Free State Province (mean = 4,5052) (cf. Table 5.1 to 5.6).

- The differences in regard to the overall mean scores of the Free State Province and the various education districts, where training needs and importance of HRM tasks are compared to each other, is statistically significant (P < 0,05). The comparison with the various HRM tasks in regard to training needs and the importance of mean scores of the HRM tasks is statistically significant in the Free State Province and within the various education districts, except in one case, namely the career planning of staff in the Xhariep Education District (cf. Tables 5.1 to 5.6).

### 7.3.3.2 Training needs and the importance of aspects of the HRM task of school principals according to various subcategories

- The comparison of training needs and the importance of the HRM tasks in the various subgroups indicate continuously, in regard to the overall mean scores, that respondents' training needs are statistically significantly smaller than the importance of the various HRM tasks (cf. Table 5.7 to 5.16).

- The comparison of the various HRM tasks in regard to training needs and the importance of the HRM tasks indicate that the difference of means in all cases of all subgroups is statistically significant, except in the case of DAS for educators for female respondents (cf. Table 5.7 to 5.16).

### 7.3.3.3 Training needs and the importance of HRM tasks of school principals compared in different subgroups

**(a) Gender**

- The training needs of female respondents (mean = 3,8841) are higher than those of school principals in the Free State Province in general (mean = 3,6627). Female school principals also view the HRM tasks as more

important (mean = 4,5290) than school principals in the Free State Province in general (means = 4,5052). On the other hand, both training needs and importance of HRM tasks (mean = 4,5005) are lower than those of school principals in the Free State Province in general (mean score of training needs = 3,6627; mean score of importance of HRM tasks = 4,5052) (cf. Tables 5.1; 5.17 & 5.18).

- Both male and female respondents see motivational techniques as their greatest training need as well as their most important HRM task, with female respondents also indicating training and development of staff as their most important HRM task. This agrees with the responses overall in the Free State Province (cf. Table 5.1; 5.17 & 5.18).

**(b) Age**

- Respondents older than 40 years have a greater overall training need (mean = 3,6963) than respondents younger than 40 years (mean = 3,5367), but respondents younger than 40 years view their HRM tasks as more important (mean = 4,5932) than respondents older than 40 years (mean = 4,4816) (cf. Table 5.19 & 5.20).

- The group respondents older than 40 years indicate a greater training need (mean = 3,6963) than do respondents in the Free State Province overall (mean = 3,6627), but this grouping's view regarding the importance of the HRM tasks is lower (mean = 4,4816) than the overall Free State Province mean score of 4,5052. Respondents younger than 40 years have a lower training need (mean = 3,5367), but a higher importance of the HRM tasks (mean = 4,5932) than the overall Free State Province where training needs indicate a mean score of 3,6627 and the importance of HRM tasks a mean score of 4,5052 (cf. Table 5.1; 5.19 & 5.20).

- Motivational techniques is seen by both groups as their most important training need. Respondents younger than 40 years view training and development of staff as their most important HRM task with motivational techniques as their second most important HRM task. Respondents older

than forty years, however, view motivational techniques as their most important HRM task with training and development of staff as second most important. It is once again very much in agreement with the responses of respondents in the Free State Province (cf. Table 5.1; 5.19 & 5.20).

**(c) Qualifications**

- The training needs of respondents with a B.Ed. (Honours) qualification (mean = 3,6733) are bigger than those without a B.Ed. (Honours) qualification (mean = 3,6551). With reference to the importance of HRM tasks, respondents with a B.Ed. (Honours) qualification (mean = 4,5518) see the HRM tasks as more important than those without a B.Ed. (Honours) qualification (mean = 4,4717) (cf. Table 5.21 & 5.22).

- The training needs of respondents with a B.Ed. (Honours) qualification (mean = 3,6733) and the importance of HRM tasks (mean = 4,5518) of these respondents, are both higher than these of the Free State Province in general (mean score for training needs = 3,6627; mean score for importance of HRM tasks = 4,5052). In return, the training needs of respondents without a B.Ed. (Honours) qualification (mean = 3,6551) and the importance of HRM tasks (mean = 3,6627) is both lower than those of the Free State Province in general (mean score of training needs = 3,6627; mean score of importance of HRM tasks = 4,5052) (cf. Table 5.1; 5.21 & 5.22).

- Motivational techniques is seen as their greatest training need and their most important HRM task by respondents who do not possess a B.Ed. (Honours). Respondents with a B.Ed. (Honours), however, view health and safety management as their greatest training need and the training and development of staff as their most important HRM task (cf. Table 5.21 & 5.22).

**(d) Teaching experience**

- Respondents with less than 20 years teaching experience have a greater training need (mean = 3,7028) and see their HRM tasks as more important

(mean = 4,5763) than respondents with more than 20 years teaching experience where training needs indicate a mean score of 3,6313 and the HRM tasks' importance a mean score of 4,4494 (cf. Table 5.23 & 5.24).

- Respondents with less than 20 years teaching experience have a greater total training need (mean = 3,7028) and view the HRM tasks as more important (mean = 4,5763) than the Free State Province where training needs show a mean score of 3,6627 and the importance of HRM tasks indicate a mean score of 4,5052. On the other hand, respondents with more than 20 years teaching experience have a smaller need for training (mean = 3,6313) and view their HRM tasks (mean = 4,4492) less important than the overall view in the Free State Province (mean score of training needs = 3,6627; mean score of importance of HRM tasks = 4,5052)(cf. Table 5.1; 5.23 & 5.24).

- Respondents with less than 20 years teaching experience see their greatest training need as health and safety management, with motivational techniques in second place and the training and development of staff as their most important HRM tasks. On the other hand, motivational techniques are seen as their most important training need by respondents with more than 20 years teaching experience with shortlisting and interviews (mean < 3) as the single HRM task for which a training need is not felt (cf. Table 5.23 & 5.24).

## (e) Experience as school principal

- The overall training needs of respondents with more than 10 years experience as school principal is greater (mean = 3,6833) as respondents with less than 10 years experience as school principal (mean = 3.6500). The importance of HRM tasks of respondents with less than 10 years experience as school principals is higher (mean = 4,5100) than respondents with more than 10 years experience as school principals (mean = 4.4974) (cf. Table 5.25 & 5.26).

- Respondents with less than 10 years experience as school principal have a lesser training need (mean = 3,6500) than respondents with more than 10 years teaching experience. Respondents with less than 10 years experience as school principal view the various HRM tasks as slightly more important (mean = 4,5100) than their colleagues in general in the Free State Province (mean = 4,5052). Respondents with more than 10 years teaching experience view the HRM tasks as less important (mean = 4,4974) than respondents in general in the Free State Province (mean = 4,5052) (cf. Table 5.1; 5.25 & 5.26).

- Motivational techniques is seen as their greatest training need and their most important HRM task by respondents with less than 10 years experience as school principal, with respondents with more than 10 years experience as school principal indicating health and safety management as their most important training need and training and development of staff as their most important HRM task (cf. Table 5.25 & 5.26),

**7.3.3.4 Training needs and the importance of the HRM tasks compared with training needs and the importance of HRM tasks in different education districts**

**(a) Training needs of different education districts compared**

- The overall training needs of the different education districts indicate a definite training need in all education districts. The various training needs of the different education districts are shown in Table 7.2 (cf. Table 7.2).

- The difference in the training needs of respondents in different education districts is not statistically significant except in one instance (Thabo Mofutsanyana compared to the Northern Free State Education District). This indicates that there is great overall similarities in regard to training needs in the various education districts (P < 0,05) (cf. Table 5.27; 5.29; 5.31; 5.33; 5.35; 5.37; 5.39; 5.41; 5.43 & 5.45).

**(b) Importance of HRM tasks in different education districts compared**

- All the overall mean scores of all the education districts indicate that the HRM tasks of the school principal is seen as important in regard to the daily task of the school principal. Table 7.2 gives an exposition of the overall mean scores of the various education districts in regard to the importance of the HRM tasks of the school principal (cf. Table 7.2).

- The comparison of the importance of the HRM tasks among various education districts indicate on a continuous basis that the differences are not statistically significant (P > 0,05) (cf. Table 5.28; 5.30; 5.32; 5.34; 5.36; 5.38; 5.40; 5.42; 5.44 & 5.46).

## 7.3.4 Findings with regard to the fourth problem question of this study: What contribution can the implementation of an HRM model make in the daily HRM task of school principals in the Free State Province?

- The HRM model (cf. Chapter 6) has been compiled to serve as guideline for school principals in the Free State Province to manage their HRM task professionally.

- This model must be adjusted by each school principal to the situation of the school where he/she serves as school principal.

## 7.4 RECOMMENDATIONS

### 7.4.1 Introduction

Because of the complexity of the HRM task of the school principal in the Free State Province and information which was obtained by means of the literature study, the empirical research and personal daily execution of the HRM task of school principals, some recommendations will be made by referring to:

- HR provision and HR maintenance as HRM task of the school principal;
- the execution of the HRM task of the school principal in schools in the Free State Province;

- the establishment of training needs of school principals in the Free State Province;
- the compilation of an HRM model to support school principals in regard to their HRM task.

These recommendations can be linked to the **fifth problem question of the study: Which recommendations can be made in regard to the HRM task of school principals in the Free State Province?**

## 7.4.2 Recommendations regarding HR provision and HR maintenance as HRM task of school principals

The following recommendations are made:

- Staff should be nurtured and treated with more respect and compassion (cf. 2.3).

- A positive school culture should be created within which staff can execute their daily task so that a united focus on the achievement of the schools' goals becomes the focus point (cf. 2.4.1 & 2.4.2).

- School principals must have an HR forecasting vision to ensure that the right staff will be appointed in the right positions on the long and short term. Re-training of staff to provide in future needs is essential (cf. 2.8.2.1; 2.8.2.4; 3.2.2.2; 6.2.1 & 6.2.2).

- School principals must move their SGB towards the allocation of bursaries from school funds in order to ensure that sufficient staff will be employed for future education at the school so that they can ensure quality education. This level of innovative thought needs to be built on in order to ensure that qualified educators will be found in classrooms in future. SGB's with such foresight, willing to make investments in the management of the school, should be supported by the private sector, especially in the case of scarce subjects like Mathematics, Natural Science, Accounting and Technical Subjects (cf. 2.8.2.4; 4.3.4.3 & 6.2.2).

- Staff must be active co-workers when job descriptions are formulated, because it can lead to the acceptance of the job description and all staff members should have a complete job description (cf. 2.8.4.2; 4.3.5.5 & 6.2.4).

- The use of job design approaches, namely job simplification, job enlargement, job enrichment and job rotation can be used to focus staff on self-actualization in regard to their daily task which will therefore in turn focus the staff on the realization of the goals of the school (cf. 2.8.6.3 & 6.2.3.1).

- School principals should have knowledge of legislation implemented to regulate employment practices and the influence thereof on employment in schools (cf. 2.3.7).

- Human resources of schools must be managed in such a way that an interest will be created in job-seekers to apply for a post at a certain school (cf. 2.8.8.1 & 6.2.7).

- The FSDoE must ensure that the advertisements in the vacancy lists for educators as well as for staff falling under the Public Service Act are done thoroughly and completely to ensure that the applicants for these posts qualify for the posts and that applicants have the necessary information regarding the post and the school. If staff members are provided with the necessary information it can fulfil the role of an RJP (cf. 2.8.8.2; 2.8.8.5(b); 2.8.8.3 & 6.2.7). The following aspects can additionally be indicated in advertisements:
  - ➢ size of the school;
  - ➢ extra-mural activities needed;
  - ➢ special skills like computer literacy;
  - ➢ contact details and person at the school;
  - ➢ physical address of the school.

- Walk-ins and write-ins (also phone-ins) must be handled with great care. It is also determining in regard to the image of the school formed by potential applicants (cf. 2.8.8.5 (b); 4.3.4.5; 4.3.4.6; 4.3.4.7; 6.2.7.2 & 6.2.7.3).

- School principals must manage the selection process with confidence by ensuring that they are properly prepared and trained in facilitating the total selection process (cf. 6.2.8).

- School principals must be informed as far as legislation regarding appointments in Departmental vacancies and SGB posts are concerned (cf. 2.8.9.4).

- The structure of the employment interview must challenge as well as stimulate the candidate (cf. 2.8.9.6(b)(ii) & 2.8.9.6(c)(ii)).

- Employment (as well as recruitment) in the education sector must go further than the mere filling of posts. The image of education as a career possibility for future educators must be upgraded in order to recruit educators for the future (cf. 2.8.8.5 (b)).

- School principals must manage the induction process as a continuous process for both newly appointed as well as present staff (cf. 2.8.11.5 & 6.2.10.8).

- Every school should have an induction policy (cf. 2.8.11.5; 4.3.4.12; 6.2.10.1 & 6.2.10.2).

- School principals must constitute induction teams as the situation calls for it (cf. 2.8.11.4; 2.8.11.5; 4.3.4.14; 6.2.10.3 & Table 6.1).

- School principals must play an active role in the induction process to ensure success (cf. 2.8.11.3; 2.8.11.5; 4.3.4.14 & 6.2.10.4(a)).

- School principals must play an active role in the career management of all staff (cf. 2.8.12.5; 4.3.4.17 & 6.2.11).

- Schools should be institutions for continuous learning for all categories of staff (cf. 3.2.2.1).

- School principals and SGB's must see the development of staff as an investment (cf. 3.2.2.2).

- Training and development of staff at schools must also focus on unskilled staff and not only on professionally qualified staff members (cf. 6.3.1; 6.3.1.3; 6.3.1.4; 6.3.1.5 & 6.3.1.6).

- The performance of staff must be continuously compared with expected performance (cf. 3.3.1).

- Performance appraisal must focus on the person's performance and not on the person (cf. 3.3.8.1).

- School principals must ensure that proper PA interviews are in place in order to be able to give feedback to staff (cf. 3.3.8.1).

- Performance criteria and performance indicators must be developed to manage school's staff in such a way that they have the ability to identify their contribution in the performance of the school and focus their own action on this (cf. 3.3.9.1).

- Circumstances must be created at the school so that staff members voluntarily give their best (cf. 3.5.3).

- School principals must determine the QWL of all the school's staff members by investigating personal circumstances, working conditions and the nature of the person's tasks in regard to challenges, level of interest and satisfaction and then to act upon this information (cf. 3.6.2 & 6.3.5).

- By looking after the QWL of the staff, staff performance will also be improved (cf. 3.6.5 & 6.3.5.3).

- School principals must accept their leadership in regard to the success of the school and develop and extend their leadership potential (cf. 3.7.1 & 6.3.6).

- The role of groups and the functioning thereof must be applied by school principals to achieve the goals of the school (cf. 3.8.1 & 6.3.7).

- Group functioning and leadership within groups can serve as an important source of leadership development for individuals which could eventually lead to staff achieving their potential with positive results for the school (cf. 3.8.3 & 6.3.7.4).

- No school can function properly or be successful and aim at achieving its goals if the school principal does not ensure that good labour relations are part of daily life, therefore the school principal must ensure fair treatment for staff (cf. 3.9.1 & 6.3.9).

- School principals should work in partnership with unions to ensure smooth school management (cf. 3.9.2 & 6.3.8.1).

- Complaints and unhappiness of staff must be addressed immediately because it can develop into a grievance (cf. 3.9.4 & 6.3.8.2).

- School principals must manage their staff in such a way that disciplining of staff would not be needed (cf. 3.9.5.3 (b) & 6.3.8.3 (b)).

- School principals must ensure that they understand the handling of grievances of staff members and manage the process properly (cf. 6.3.8.2 & Figure 6.6).

- The handing of disciplinary hearings must take place according to regulation and school principals must always apply the Audi Alteram Partem rule and be aware of the steps to be followed in a disciplinary hearing or action (cf. 6.3.8.2; Figure 6.7; 6.8 & 6.9).

- Structured exit-interviews must be undertaken with all staff members because they can provide the school principal with valuable management information (cf. 3.9.7.6 & 4.3.4.42).

- School principals must eliminate shortcomings in regard to health and safety management by means of proper management (cf. 3.10.1 & 6.3.9.1).

- A representative safety committee in which the school principal plays a leading role should be convened for every school (cf. 4.3.4.27 & 6.3.9.2 (i)).

## 7.4.3 Recommendations regarding the performance of the HRM task of school principals in schools

- The presentation of a B.Ed. (Honours) course by tertiary institutions with an HRM endorsement can fill the need in regard to HRM training for school principals (cf. 4.3.2).

- School principals must compile an HRM policy document for their school's unique circumstances (cf. 4.3.4.1).

- An extensive research project must be launched by the FSDoE in the Free State Province in order to investigate the present shortage of educators in the scarce subjects in order to fill the expected future shortage in these subjects (cf. 4.3.4.2).

- Walk-ins, write-ins and phone-ins as sources of applicants for employment must be properly structured by school principals as it is an important source of recruitment especially in view of the filling of temporary or SGB posts (cf. 4.3.4.5; 4.3.4.6 & 4.3.4.7).

- Applications for posts must be properly screened by officials of the FSDoE, because it could lead to disputes during the selection process (cf. 4.3.48).

- The induction process on a structured basis must receive urgent attention in schools (cf. 4.3.4.12 & 4.3.4.13).

- In order to let the induction process proceed successfully school principals must play a leading role in the process (cf. 4.3.4.14).

- All staff categories must be exposed to a proper induction process (cf. 4.3.4.15).

- SGB's must ensure that training and development of school principals take place (cf.4.3.4.16).

- School principals can facilitate the training and development process in their schools by following a structured process for training and development for all categories of staff (cf. 4.3.4.16).

- Involve Post Level 1 educators and non-educators in the school's SMT. It is an important link in the training and development of staff (cf. 4.3.4.16).

- See career planning as a priority for all staff in the school, with the school principal playing a leadership role in this process (cf. 4.3.4.17).

- SGB's must be properly trained for their participation in the HRM of the school (cf. 4.3.4.18).

- The lack of training and development of SGB's is a dangerous situation, as it could lead to labour disputes if processes are not followed correctly. SGB's must be trained in the management of the selection process specifically regarding HRM, as well as contracting of staff members and also in regard to the general management of the school. The SGB must be trained in regard to the management processes for which they are

responsible as their activities greatly influence the functioning of the school and the achievement of teaching and education goals (cf. 4.3.4.18).

- Quality motivational sessions must be presented for all the categories of staff (cf. 4.3.4.21 & 4.3.4.22).

- The SDT should play a big role in the training and development of the school staff, specifically aimed at curricular changes, but also at the total staff corps of the school.

- Staff at schools must be made aware of the grievance procedure that they are able to follow (cf. 4.3.4.24).

- School principals must ensure that the school terrain, tools and machinery (equipment) are inspected regularly and that these reports are kept safely (cf. 4.3.4.29 & 4.3.4.30).

- School principals must keep up to date with the stipulations of the Occupational Health and Safety Act, 85 of 1993 and consider attending a course regarding this Act (cf. 4.3.4.28).

- The FSDoE must present a structured course that is made up of different modules regarding HRM to empower school principals for their HRM tasks (cf. 4.3.4.28 & 4.3.4.41).

- The feeling of school principals regarding the support role of SMD's, Education District Offices and the Education Head Office must urgently be investigated in order to ensure quality HRM in schools in the Free State Province (cf. 4.3.4.39 & 4.3.4.40).

- PA (PDMS) for non-educators and DAS (IQMS) for educators, who are appointed in SGB posts, must be done (cf. 4.3.5.2 & 4.3.5.3).

- School principals must be properly trained to be able to handle contracting of staff (cf. 4.3.5.4).

## 7.4.4 Recommendations regarding the training needs of school principals in the Free State Province

- The training needs of respondents in the Free State Province must be addressed in the following order of priority:
  - ➢ Motivational techniques
  - ➢ Training and development of staff
  - ➢ Disciplinary aspects
  - ➢ HR administration
  - ➢ Health and safety management
  - ➢ DAS (IQMS) for educators
  - ➢ Career plans of staff
  - ➢ PA (PDMS) of non-educators (cf. Table 5.1).

- The FSDoE must investigate the responses of school principals to ascertain why motivational techniques is seen as the greatest training need and the most important HRM task. It must be determined if education in the Free State Province has reached a stage where staff and specific educators have possibly reached the lowest point in their career lives (cf. Table 5.1).

- Although a training need for shortlisting and interviews was not indicated by respondents in the Free State Province (mean < 3), school principals should ascertain if they are, in fact, on standard regarding the shortlisting and interviews according to Departmental guidelines, legal prescriptions and professional requirements (cf. Table 5.1).

- PA (PDMS) for non-educators, DAS (IQMS) for educators and career planning of staff should be a priority of all school principals (cf. Table 5.1).

- School principals must do some soul-searching regarding the big difference in mean scores where the differences are statistically significant (P < 0,05) when training needs are compared with the importance granted to the

various HRM tasks. Are school principals really as experienced and well equipped for their HRM task (cf. Table 5.1)?

- The FSDoE must facilitate and finance the training and development of school principals, but make use of professional presenters and authorities in their fields (cf. 4.3.4.38 & 4.3.4.41).

- Unions can play a very big role in the training and development of school principals who are members, with well-planned courses. It will enrich school principals, but also promote members on grassroots level, as the school principal will be able to better manage HRM.

## 7.5  RECOMMENDATIONS FOR FURTHER RESEARCH

In the light of the mentioned research the recommendation is made that further research will be undertaken regarding the following aspects of the HRM task of school principals:

- QWL of educators
- QWL of school principals
- A training and development model for school principals
- Health and safety management in schools
- Effectiveness of the FSDoE in regard to the facilitation of HRM in schools
- Performance management in schools
- The shortage of educators in the so-called scarce subjects in schools
- Legal background of school principals in regard to their HRM task
- Job satisfaction of school principals

## 7.6  SUMMARY

This research has given an overview of HRM as management task of school principals in the Free State Province. Although the situation regarding HRM differS in business practice from HRM in schools, the application of HRM on practices as described in the literature study gives an overview to school principals regarding their HRM task. The pressure on school principals in regard to HRM is steadily increasing and therefore urgent attention must be given to the training needs of school principals in regard to HRM.

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# APPENDICES

# APPENDIX A

# LETTER FROM STUDY SUPERVISOR

# APPENDIX B

# LETTER FROM FSDoE:
# REGISTERING RESEARCH PROJECT

# APPENDIX C

# QUESTIONNAIRE

| INLIGTING MET BETREKKING TOT 'N MODEL OM MENSLIKE HULPBRONNEBESTUUR AS BESTUURSTAAK VAN SKOOLHOOFDE IN DIE VRYSTAAT PROVINSIE TE FASILITEER | INFORMATION REGARDING A MODEL TO FACILITATE THE HUMAN RESOURCES MANAGEMENT TASK OF SCHOOL PRINCIPALS IN THE FREE STATE PROVINCE |
|---|---|
| Dit behoort u nie langer as 12 minute te neem om die vraelys te voltooi nie. | It should not take you longer than 12 minutes to complete this questionnaire |

| Instruksies vir die voltooiing van die vraelys: | Instructions for completing of the questionnaire: |
|---|---|
| Hierdie vraelys is uitsluitlik vir navorsingsdoeleindes. | This questionnaire is strictly for research purposes. |
| Moet asseblief **nie** u naam verskaf **nie**. U eerlike respons sal daarom van groot waarde wees vir die navorsing en opreg waardeer word. | Please do **not** supply your name. Your honest response will be of great value and appreciated. |
| Alle inligting sal **vertroulik** hanteer word. | All information will be treated **confidentially**. |
| Daar is geen regte of verkeerde antwoorde nie - slegs u eerlike opinie. | Please note that there are no right or wrong answers - only your honest opinion. |
| Die vraelys moet deur die skoolhoof of waarnemende skoolhoof voltooi word. | The questionnaire must be completed by the school principal or acting school principal. |
| Die vraelys bestaan uit **vier afdelings**, naamlik **Afdeling A** (Persoonlike inligting), **Afdeling B** (Skoolinligting) en **Afdeling C** (Menslikehulpbronnebestuur as bestuurstaak en -verantwoordelikheid van die skoolhoof) en **Afdeling D** (Menslikehulpbronnebestuur en Beheerliggaamaan= stellings). Voltooi asseblief **al vier** afdelings **volledig**. | The questionnaire consists of **four sections**, namely **Section A** (Personal information), **Section B** (School information), **Section C** (Human resources management as managerial task of the school principal) and **Section D** (Human resources management and SGB appointments). Please complete **all four** sections **in full**. |

POS ASSEBLIEF <u>TEEN 16 MEI 2003</u> TERUG IN DIE GEFRANKEERDE KOEVERT AAN:
JOHAN GRIESEL, POSBUS 30146, PELLISSIER, 9322
PLEASE MAIL BACK IN ADDRESSED ENVELOPE <u>BY 16 MAY 2003</u> TO:
JOHAN GRIESEL, P.O. BOX 30146, PELLISSIER, 9322

AFDELING A: PERSOONLIKE INLIGTING
SECTION A: PERSONAL INFORMATION

Trek 'n sirkel in die toepaslike blokkie.
Circle your response in the appropriate block.

Voorbeeld: Is u skool geleë in die Vrystaat Provinsie?
Example: Is your school situated in the Free State Province?

| Ja<br>Yes | Nee<br>No |
|---|---|
| ①  | 2 |

1. Geslag / Gender

| Manlik<br>Male | Vroulik<br>Female |
|---|---|
| 1 | 2 |

2. Ouderdom (in jare) / Age (in years)

| - 30 | 31 - 40 | 41 - 50 | 51 - 60 | 61 + |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |

3. Posvlak / Post level

| 2 | 3 | 4 |
|---|---|---|
| 1 | 2 | 3 |

4. Indien u oor 'n B.Ed.(Honneurs) beskik, dui u spesialiseringsveld aan, anders beweeg na VRAAG 5.
   If you have a B.Ed.(Honours), indicate your field of specialization, otherwise move to QUESTION 5.

| | |
|---|---|
| Algemeen - Akademies<br>General - Academic | 1 |
| Beleidstudie en Gesagsverhoudinge<br>Policy studies and Governance | 2 |
| Kurrikulumstudie<br>Curriculum Studies | 3 |
| Psigo-opvoedkunde<br>Psychology in education | 4 |
| Leierskap en bestuur<br>Leadership and management | 5 |

5. Beskik u oor enige kwalifikasies spesifiek gerig op menslikehulpbronnebestuur?
   Do you have any qualification in human resources management?

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

6. Totale onderwyservaring (in jare)
   Total teaching experience (in years)

| 0 - 10 | 11 - 20 | 21 - 30 | 31 + |
|---|---|---|---|
| 1 | 2 | 3 | 4 |

7. Jare ervaring as skoolhoof
   Years experience as school principal

| 0 - 10 | 11 - 20 | 21 - 30 | 31 + |
|---|---|---|---|
| 1 | 2 | 3 | 4 |

**AFDELING B: SKOOLINLIGTING**
**SECTION B: SCHOOL INFORMATION**

8. Medium van onderrig
   Medium of instruction

| Parallel | Afrikaans | English | Sotho | Tswana | Zulu | Xhosa | Ander/Other |
|---|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |

Indien parallelmedium, dui asseblief onderskeie tale aan:
If parallel medium, please indicate languages:

_____     _____

9. Aantal leerders in skool
   Number of learners in the school

| 1 -500 | 501 - 1000 | 1001 - 1500 | 1501 + |
|--------|------------|-------------|--------|
| 1 | 2 | 3 | 4 |

10. Dui die kategorieë van personeel by u skool aan. (Dui ALLE kategorieë aan - u kan meer as een merk.)
    Indicate the categories of staff at your school. (Indicate ALL catergories - you can mark more than one).

| | |
|---|---|
| Opvoeders / Educators | 1 |
| Ondersteuningspersoneel bv. terapeute / Support staff e.g. therapists | 2 |
| Administratief / Administrative | 3 |
| Terrein / Terrain | 4 |
| Koshuis / Hostel | 5 |
| Pre-primêr / Pre-primary | 6 |
| Ander (spesifiseer) * / Other (specify) * | 7 |

   * Ander (Spesifiseer) / Other (specify):
   _____
   _____

11. Totale aantal personeel - dit sluit die totaal van alle kategorieë in soos in VRAAG 10.
    Total number of staff - this includes the total of all categories of staff as in QUESTION 10.

| 1 - 25 | 26 - 50 | 51 - 75 | 76 - 100 | 101 + |
|--------|---------|---------|----------|-------|
| 1 | 2 | 3 | 4 | 5 |

---

**AFDELING C: MENSLIKEHULPBRONNEBESTUUR AS BESTUURSTAAK
VAN DIE SKOOLHOOF
SECTION C: HUMAN RESOURCES MANAGEMENT AS MANAGEMENT TASK
OF THE SCHOOL PRINCIPAL**

12. Het u skool 'n menslikehulpbronnebestuursbeleidsdokument?
    Does your school have a human resources management policy?

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

13. Ondervind u tans 'n tekort aan opvoeders in sogenaamde skaars vakke soos Wiskunde, Skeinat/
    Algemene Wetenskap en Rekeningkunde of enige ander vak?
    Do you experience a problem when you have to appoint educators for subjects such as Mathematics,
    Science/Natural Science and Accounting or any other subject?

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

14. Dink u daar gaan 'n tekort aan gekwalifseerde opvoeders by u skool in die toekoms wees?
    Do you think there will be a shortage of qualified educators at your school in future?

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

15. Is u skool betrokke by 'n projek om Beheerliggaambeurse aan voornemende onderwysstudente uit skoolfondse toe te ken, om gekontrakteerd aan u skool verbonde te wees na voltooiing van hul studies?
Is your school involved in a project to award teaching bursaries from your SGB to education students to contract them to your school after completion of their studies?

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

16. Indien u vakante Departementele poste het wat in die Departementele vakaturelys geadverteer is, adverteer u ook hierdie poste in die media om die aansoekerbasis te vergroot?
If your vacant Departmental posts are advertised in the Departmental vacancy list, do you advertise these posts in the media as well to create a broader application base?

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

17. Ontvang u gereeld aansoeke per pos of persone wat by die skool aankom met hul aansoeke, al het u nie in daardie stadium vakante poste nie?
Do you receive applications via mail or find persons arriving at school with their applications on a regular basis, although you do not have any vacancies?

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

18. Ontvang u die persone PERSOONLIK wat by u skool aankom om hul aansoeke af te gee?
Do you receive the persons IN PERSON arriving at your school to hand in their applications?

| Altyd<br>Always | Dikwels<br>Often | Soms<br>Sometimes | Selde<br>Seldom | Nooit<br>Never |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |

19. Maak u gebruik van die aansoekers soos in Vraag 17 en 18 beskryf in vakante poste?
Do you make use of the applicants mentioned in Question 17 and 18 in vacant posts?

| Ja<br>Yes | Soms<br>Sometimes | Nee<br>No |
|---|---|---|
| 1 | 2 | 3 |

20. Kom die Departement sy verantwoordelikheid na in terme van die sifting van aansoeke voordat dit aan die Beheerliggaam oorhandig word?
Does the Department fulfil its responsibility in terms of the screening of applications before the applications are handed over to the SGB?

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

21. Wie aanvaar die VERANTWOORDELIKHEID vir kennis gee aan vakbonde en kandidate vir die saamstelling van die kortlys en onderhoude onderskeidelik?
Who accepts RESPONSIBILITY for notifying unions and candidates about shortlisting and interviews respectively?

| Skoolhoof<br>School principal | Beheerliggaam<br>SGB | Ander (spesifiseer) *<br>Other (specify) * |
|---|---|---|
| 1 | 2 | 3 |

* Ander (spesifiseer) / Other (specify): _____

**22. Wie stel die vrae saam vir onderhoude? (U kan meer as een merk)**
**Who sets the questions for interviews? (You can indicate more than one)**

| Skoolhoof<br>School principal | Beheerliggaam<br>SGB | Bestuurspan<br>School management team | Ander (spesifiseer) *<br>Other (specify) * |
|:---:|:---:|:---:|:---:|
| 1 | 2 | 3 | 4 |

* Ander (spesifiseer) / Other (specify): _____

**23. Wie hanteer die administrasie vir Departmentele aanbevelings na afhandeling van onderhoude?**
**Who does the administration of Departmental recommendations after completion of interviews?**

| Skoolhoof<br>School principal | Beheerliggaam<br>SGB | Bestuurspan<br>School management team | Ander (spesifiseer) *<br>Other (specify) * |
|:---:|:---:|:---:|:---:|
| 1 | 2 | 3 | 4 |

* Ander (spesifiseer) / Other (specify): _____

**24. Het u skool 'n induksiebeleid (oriëntasiebeleid) of program vir nuwe aanstellings?**
**Does your school have an induction (orientation) policy or programme for new appointments?**

| Ja<br>Yes | Nee<br>No | Weet nie<br>Do not know |
|:---:|:---:|:---:|
| 1 | 2 | 3 |

**25. Word enige vorm van induksie (oriëntasie) by u skool gedoen vir nuwe aanstellinge?**
**Do you do any form of induction (orientation) at your school for new appointments?**

| Ja<br>Yes | Nee<br>No | Weet nie<br>Do not know |
|:---:|:---:|:---:|
| 1 | 2 | 3 |

**Indien daar GEEN induksie (oriëntasie) by u skool plaasvind nie, beweeg na VRAAG 28**
**If NO induction (orientation) is done at your school, move to QUESTION 28.**

**26. Wie bestuur die induksieproses (oriëntasieproses) by u skool?**
**Who manages the induction (orientation) process at your school?**

| Skoolhoof<br>School Principal | Lid van Bestuurspan<br>Member of SMT | Niemand nie<br>No one | Ander (spesifiseer) *<br>Other (specify) * |
|:---:|:---:|:---:|:---:|
| 1 | 2 | 3 | 4 |

* Ander (spesifiseer) / Other (specify): _____

**27. Word 'n VOLLEDIGE induksieproses (oriëntasieproses) vir die volgende kategorieë personeel gedoen?**
**Do you do a COMPLETE induction (orientation) process for the following categories of staff?**

27.1 **Opvoeders**
     **Educators**

| Ja<br>Yes | Nee<br>No |
|:---:|:---:|
| 1 | 2 |

27.2 **Administratief**
     **Administrative**

| Ja<br>Yes | Nee<br>No |
|:---:|:---:|
| 1 | 2 |

27.3 **Terrein**
     **Terrain**

| Ja<br>Yes | Nee<br>No |
|:---:|:---:|
| 1 | 2 |

27.4 **Koshuis**
     **Hostel**

| Ja<br>Yes | Nee<br>No |
|:---:|:---:|
| 1 | 2 |

28. Het u skool 'n beleid vir die opleiding en ontwikkeling van die:
Does your school have a policy for the training and development of the:

| 28.1 | Skoolhoof/ School Principal | Ja Yes | Nee No |
|------|------|------|------|
| | | 1 | 2 |

| 28.2 | Bestuurspan/ SMT | Ja Yes | Nee No |
|------|------|------|------|
| | | 1 | 2 |

| 28.3 | Opvoeders/ Educators | Ja Yes | Nee No |
|------|------|------|------|
| | | 1 | 2 |

| 28.4 | Nie-onderwyspersoneel/ Non-educators | Ja Yes | Nee No |
|------|------|------|------|
| | | 1 | 2 |

29. Wie is verantwoordelik vir die bestuur van loopbaanbeplanning en -ontwikkeling van personeel in u skool?
Who is responsible for the management of career planning and development of staff at your school?

| Skoolhoof School principal | Bestuurspan SMT | Ander (spesifiseer) * Other (specify) * |
|------|------|------|
| 1 | 2 | 3 |

* Ander (spesifiseer) / Other (specify): _____

30. Het u skool 'n beleid rondom die opleiding en ontwikkeling van die Beheerliggaam vir hul verantwoorde= likheid rondom menslikehulpbronnebestuur?
Does your school have a policy for the training and development of the SGB for their human resources management task?

| Ja Yes | Nee No |
|------|------|
| 1 | 2 |

31. Het u skool 'n skoolontwikkelingspan?
Does your school have a school development team?

| Ja Yes | Nee No |
|------|------|
| 1 | 2 |

Indien u GEEN skoolontwikkelingspan het nie, beweeg na VRAAG 33.
If you DO NOT HAVE a school development team, move to QUESTION 33.

32. Wie is die voorsitter van die skoolontwikkelingspan?
Who is the chairperson of the school development team?

| Skoolhoof School principal | Lid van bestuurspan Member of SMT | Ander (spesifiseer) * Other (specify) * |
|------|------|------|
| 1 | 2 | 3 |

* Ander (spesifiseer) / Other (specify): _____

**33. Word enige motiveringsessies vir personeel gehou?**
   **Are any motivational sessions held for the staff?**

**33.1** Opvoeders/
       Educators

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

**33.2** Nie-onderwyspersoneel/
       Non-educators

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

   * Ander (spesifiseer) / Other (specify): _____

**Indien GEEN motiveringsessies aangebied word nie, beweeg na VRAAG 36.**
**If NO motivation sessions are presented to staff, move to QUESTION 36.**

**34. Hoe gereeld word hierdie motiveringsessies aangebied?**
   **How frequently are these sessions held?**

**34.1** Opvoeders/
       Educators

| Kwartaalliks<br>Quarterly | Ses-maandeliks<br>Six-monthly | Jaarliks<br>Annually | Ander (spesifiseer) *<br>Other (specify) * |
|---|---|---|---|
| 1 | 2 | 3 | 4 |

   * Ander (spesifiseer) / Other (specify): _____

**34.2** Nie-onderwyspersoneel/
       Non-educators

| Kwartaalliks<br>Quarterly | Ses-maandeliks<br>Six-monthly | Jaarliks<br>Annually | Ander (spesifiseer) *<br>Other (specify) * |
|---|---|---|---|
| 1 | 2 | 3 | 4 |

   * Ander (spesifiseer) / Other (specify): _____

**35. Wie bied hierdie motiveringsessies aan?**
   **Who presents these motivational sessions?**

   **U KAN MEER AS EEN MERK.**
   **YOU CAN CHOOSE MORE THAN ONE.**

| Skoolhoof<br>School principal | SBO<br>SMD | Personeellid<br>Staff member | Professionele persoon<br>Professional person | Ander (spesifiseer) *<br>Other (specify) * |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |

   * Ander (spesifiseer) / Other (specify): _____

**36. Weet u personeel hoe die grieweprosedure werk?**
   **Do your staff know how the grievance procedure operates?**

| Ja<br>Yes | Nee<br>No | Onseker<br>Uncertain |
|---|---|---|
| 1 | 2 | 3 |

**37. Wie hanteer die amptelike griewe van u personeel?**
   **Who handles the official grievances of your staff?**

| Skoolhoof<br>School principal | Bestuurspan<br>SMT | Komitee<br>Committee | Beheerliggaam<br>SGB | Ander (spesifiseer) *<br>Other (specify) * |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |

   * Ander (spesifiseer) / Other (specify): _____

38. Beskou u u personeel as gedissiplineerd in die uitvoering van hul taak?
    Do you regard your staff as disciplined when performing their daily task?

| 38.1 | Opvoeders/<br>Educators | Ja<br>Yes | Nee<br>No |
|---|---|---|---|
| | | 1 | 2 |

| 38.2 | Administratief/<br>Administrative | Ja<br>Yes | Nee<br>No |
|---|---|---|---|
| | | 1 | 2 |

| 38.3 | Terrein/<br>Terrain | Ja<br>Yes | Nee<br>No |
|---|---|---|---|
| | | 1 | 2 |

39. Het u skool 'n veiligheidskomitee?
    Does your school have a safety committee?

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

40. Voldoen u skool as werkplek aan die bepalings van die Wet op Beroepsgesondheid en Veiligheid, Wet, 85 van 1993?
    Does your school as a workplace comply with the regulations of the Occupational Health and Safety Act, 85 of 1993?

| Weet nie<br>Do not know | Ja<br>Yes | Nee<br>No |
|---|---|---|
| 1 | 2 | 3 |

41. Word die terrein, gereedskap (wat lere insluit) en toerusting gereeld geïnspekteer?
    Are the terrain, tools (including ladders) and equipment frequently inspected?

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

42. Word die inspeksieverslae van bogenoemde skriftelik gedoen en bewaar?
    Are inspection reports completed in writing and are they filed?

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

43. Het u 'n kopie van die Wet op Beroepsgesondheid en Veiligheid Wet, 85 van 1993 by die skool?
    Do you have a copy of the Occupational Health and Safety Act, 85 of 1993 at school?

| Weet nie<br>Do not know | Ja<br>Yes | Nee<br>No |
|---|---|---|
| 1 | 2 | 3 |

44. Het elke personeellid 'n persoonlike lêer? / Do all staff members have a personal file?

| 44.1 | Opvoeders/<br>Educators | Ja<br>Yes | Nee<br>No |
|---|---|---|---|
| | | 1 | 2 |

| 44.2 | Nie-onderwyspersoneel<br>Non-educators | Ja<br>Yes | Nee<br>No |
|---|---|---|---|
| | | 1 | 2 |

**45.** Het u skool 'n personeelhandleiding wat deur personeel geraadpleeg kan word?
Does your school have a staff manual that staff could consult?

| Ja<br>Yes | Nee<br>No |
|:---:|:---:|
| 1 | 2 |

**46.** Dink u dat die personeel oor die algemeen tevrede is met hul werksomstandighede by die skool (Sluit vergoeding uit)?
Do you think that your staff are satisfied with their working conditions at the school (Do not include compensation)?

| Ja<br>Yes | Nee<br>No | Onseker<br>Uncertain |
|:---:|:---:|:---:|
| 1 | 2 | 3 |

**47.** Dink u dat u personeel gelukkig is in hul beroep? /
Do you think that your staff are happy with their careers?

**47.1**

| Beslis Ja<br>Definitely Yes | Ja<br>Yes | Weet nie<br>Do not know | Nee<br>No | Beslis Nee<br>Definitely No |
|:---:|:---:|:---:|:---:|:---:|
| 1 | 2 | 3 | 4 | 5 |

**47.2**

| Beslis Ja<br>Definitely Yes | Ja<br>Yes | Weet nie<br>Do not know | Nee<br>No | Beslis Nee<br>Definitely No |
|:---:|:---:|:---:|:---:|:---:|
| 1 | 2 | 3 | 4 | 5 |

**48.** Dink u dat u personeel tevrede is met hul Departementele salarisse?
Do you think that your staff are satisfied with their Departmental salaries?

**48.1**

| Beslis Ja<br>Definitely Yes | Ja<br>Yes | Weet nie<br>Do not know | Nee<br>No | Beslis Nee<br>Definitely No |
|:---:|:---:|:---:|:---:|:---:|
| 1 | 2 | 3 | 4 | 5 |

**48.2**

| Beslis Ja<br>Definitely Yes | Ja<br>Yes | Weet nie<br>Do not know | Nee<br>No | Beslis Nee<br>Definitely No |
|:---:|:---:|:---:|:---:|:---:|
| 1 | 2 | 3 | 4 | 5 |

**49.** Is u as skoolhoof tevrede met u salaris?
Are you, as school principal, satisfied with your salary?

| Ja<br>Yes | Onseker<br>Uncertain | Nee<br>No |
|:---:|:---:|:---:|
| 1 | 2 | 3 |

**50.** Voel u dat u voldoende opgelei is om as menslikehulpbronnebestuurder van u skool te funksioneer?
Do you feel that you are sufficiently trained to be the human resources manager of your school?

| Ja<br>Yes | Nee<br>No |
|:---:|:---:|
| 1 | 2 |

**51.** Dink u dat u SBO die kennis het om u in u taak as menslikehulpbronnebestuurder by te staan?
Do you think that your SMD has the knowledge to assist you in your task as human resources manager?

| Ja<br>Yes | Onseker<br>Uncertain | Nee<br>No |
|:---:|:---:|:---:|
| 1 | 2 | 3 |

| 52. | Dink u dat u Distrikskantoor u genoegsaam bystaan met u taak as menslikehulpbronnebestuurder? Do you think that your District Office assists you enough in your task as human resources manager? | | |
| --- | --- | --- | --- |

| Ja<br>Yes | Onseker<br>Uncertain | Nee<br>No |
| --- | --- | --- |
| 1 | 2 | 3 |

| 53. | Dink u dat die Departementele Hoofkantoor u genoegsaam bystaan met u taak as menslike= hulpbronnebestuurder? Do you think that the Departmental Head Office assists you sufficiently with your task as human resources manager? |
| --- | --- |

| Ja<br>Yes | Onseker<br>Uncertain | Nee<br>No |
| --- | --- | --- |
| 1 | 2 | 3 |

54. Het u opleiding nodig in die volgende:
Do you need training in the following:

| | | 1 | 2 | 3 | 4 | 5 |
| --- | --- | --- | --- | --- | --- | --- |
| | | Beslis geen opleiding nodig | Geen opleiding nodig | Onseker | Opleiding nodig | Opleiding beslis nodig |
| | | Definitely no training needed | No training needed | Uncertain | Training needed | Training definitely needed |
| 54.1 | Kortlyssamestelling en onderhoude<br>Shortlisting and interviews | 1 | 2 | 3 | 4 | 5 |
| 54.2 | Loopbaanbeplanning van personeel<br>Career planning of staff | 1 | 2 | 3 | 4 | 5 |
| 54.3 | Opleiding en ontwikkeling van personeel<br>Training and development of staff | 1 | 2 | 3 | 4 | 5 |
| 54.4 | Dissiplinêre aangeleenthede<br>Disciplinary aspects | 1 | 2 | 3 | 4 | 5 |
| 54.5 | Gesondheids- en veiligheidsbestuur<br>Health and safety management | 1 | 2 | 3 | 4 | 5 |
| 54.6 | "Performance appraisal": nie-onderwyspersoneel<br>Performance appraisal: non-educators | 1 | 2 | 3 | 4 | 5 |
| 54.7 | Taksering van opvoeders (DAS)<br>Developmental appraisal of educators (DAS) | 1 | 2 | 3 | 4 | 5 |
| 54.8 | Menslikehulpbronne-administrasie<br>Human resources administration | 1 | 2 | 3 | 4 | 5 |
| 54.9 | Motiveringstegnieke<br>Motivational techniques | 1 | 2 | 3 | 4 | 5 |

**55. Hoe <u>BELANGRIK</u> beskou u elk van die volgende as bestuurstaak van die skoolhoof?**
**How <u>IMPORTANT</u> do you view each of the following as a management task of a school principal?**

| | | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|---|
| | | Beslis nie belangrik | Nie belangrik | Onseker | Belangrik | Baie belangrik |
| | | Definitely not important | Not important | Uncertain | Important | Very Important |
| 55.1 | Kortlyssamestelling en onderhoude<br>Shortlisting and interviews | 1 | 2 | 3 | 4 | 5 |
| 55.2 | Loopbaanbeplanning van personeel<br>Career planning of staff | 1 | 2 | 3 | 4 | 5 |
| 55.3 | Opleiding en ontwikkeling van personeel<br>Training and development of staff | 1 | 2 | 3 | 4 | 5 |
| 55.4 | Dissiplinêre aangeleenthede<br>Disciplinary aspects | 1 | 2 | 3 | 4 | 5 |
| 55.5 | Gesondheids- en veiligheidsbestuur<br>Health and safety management | 1 | 2 | 3 | 4 | 5 |
| 55.6 | "Performance appraisal": nie-onderwyspersoneel<br>Performance appraisal: non-educators | 1 | 2 | 3 | 4 | 5 |
| 55.7 | Taksering van opvoeders (DAS)<br>Developmental appraisal of educators (DAS) | 1 | 2 | 3 | 4 | 5 |
| 55.8 | Menslikehulpbronne-administrasie<br>Human resources administration | 1 | 2 | 3 | 4 | 5 |
| 55.9 | Motiveringstegnieke<br>Motivational techniques | 1 | 2 | 3 | 4 | 5 |

**56. Wie moet verantwoordelikheid aanvaar vir bogenoemde opleiding en ontwikkeling van die skoolhoof?**
**Who must take responsibility for the above-mentioned training and development of the school principal?**

| Skoolhoof<br>School principal | Onderwysdepartement<br>Education department | Vakbond<br>Union | Beheerliggaam<br>SGB | Ander (spesifiseer) *<br>Other (specify) * |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |

\* Ander (spesifiseer) / Other (specify): _____

**57. Hou u 'n formele onderhoud met personeel wat u skool verlaat?**
**Do you have formal interviews with staff leaving your school?**

57.1

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

57.2

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

*BEANTWOORD SLEGS DIE VRAE IN HIERDIE AFDELING INDIEN U BEHEERLIGGAAM= AANSTELLINGS BY U SKOOL HET.*

*ONLY ANSWER THE QUESTIONS IN THIS SECTION IF YOU HAVE SGB APPOINTMENTS AT YOUR SCHOOL.*

58.  Dui die kategorieë Beheerliggaamaanstellings aan.
     Indicate the categories SGB appointments.

| | |
|---|---|
| Opvoeders / Educators | 1 |
| Ondersteuningspersoneel bv. terapeute / Support staff e.g. therapists | 2 |
| Administratief / Administrative | 3 |
| Terrein / Terrain | 4 |
| Koshuis / Hostel | 5 |
| Pre-primêr / Pre-primary | 6 |
| Ander (spesifiseer) * / Other (specify) * | 7 |

   * Ander (spesifiseer) / Other (specify): _____

59.  Doen u "performance appraisal" vir Beheerliggaam nie-onderwyspersoneel wat deur die Beheerliggaam aangestel is?
     Do you do performance appraisal of SGB non-educators employed by the SGB?

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

60.  Doen u Taksering (DAS) vir Beheerliggaam opvoeders?
     Do you do Developmental appraisal (DAS) for SGB educators?

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

61.  Wie hanteer die kontraktering van Beheerliggaamaanstellings?
     Who handles the contractual aspects of SGB appointments?

| Skoolhoof<br>School Principal | Ander lid van Beheerliggaam<br>Other member of SGB | Ander (spesifiseer) *<br>Other (specify) * |
|---|---|---|
| 1 | 2 | 3 |

   * Ander (spesifiseer) / Other (specify): _____

62.  Beskik al u Beheerliggaamaanstellings asook nie-onderwyspersoneel oor 'n volledige posbeskrywing?
     Do all SGB appointments, including non-educators, have a job description?

| Ja<br>Yes | Nee<br>No |
|---|---|
| 1 | 2 |

| 63. Stem die vergoeding van die Beheerliggaamaanstellings ooreen met Departementele skale? |
| --- |
| Are compensation of SGB appointments the same as Departmental scales? |

| 63.1 | Ja Yes | Nee No |
| --- | --- | --- |
| | 1 | 2 |

| 63.2 | Ja Yes | Nee No |
| --- | --- | --- |
| | 1 | 2 |

| 64. Stem die byvoordele ooreen? / Are the benefits the same? |
| --- |

| 64.1 | Ja Yes | Nee No |
| --- | --- | --- |
| | 1 | 2 |

| 64.2 | Ja Yes | Nee No |
| --- | --- | --- |
| | 1 | 2 |

| 65. Ondervind u 'n groot omset van Beheerliggaamaanstellings by u skool vir: |
| --- |
| Do you perceive a large turnover of SGB appointed staff at your school for: |

| 65.1 | Ja Yes | Nee No |
| --- | --- | --- |
| | 1 | 2 |

| 65.2 | Ja Yes | Nee No |
| --- | --- | --- |
| | 1 | 2 |

BAIE DANKIE DAT U DIE VRAELYS VOLTOOI HET.
THANK YOU FOR COMPLETING THE QUESTIONNAIRE

POS ASSEBLIEF <u>TEEN 16 MEI 2003 </u>TERUG IN DIE GEFRANKEERDE KOEVERT AAN:
JOHAN GRIESEL, POSBUS 30146, PELLISSIER, 9322
PLEASE MAIL BACK IN ADDRESSED ENVELOPE <u>BY 16 MAY 2003</u> TO:
JOHAN GRIESEL, P.O. BOX 30146, PELLISSIER, 9322

# APPENDIX D

# EXAMPLE JOB DESCRIPTION

**FREE STATE DEPARTMENT OF EDUCATION**

**NAME OF SCHOOL**

**JOB DESCRIPTION: EDUCATOR**

## A. JOB INFORMATION SUMMARY

Name of incumbent          _____

Job title          _____

Persal number          _____

Post level          _____

School phase          _____

Employment          _____

Status of employment          _____

## B. JOB PURPOSE

The aim of an educator's responsibility is to ensure that learners are educated by:

- engaging in class teaching that includes academic, administrative educational and disciplinary aspects;
- organizing and presenting extra- and co-curricular activities.

## C. CORE DUTIES AND RESPONSIBILITIES OF THE JOB

### (i) Teaching

- Learning area or class teaching according to policy to ensure purposeful learning and progression of learners.
- To fulfil, as a class educator, administrative management duties.
- Lesson preparation in accordance with policy, courses and training, new approaches, initiative, etc.

- Fulfillment of academic leadership roles, for example, grade manager or learning area manager if required to.
- Assessment and reporting of academic progress of learners.
- To demonstrate the recognition of learning as an active process.
- Establishment of a an active classroom environment that is conducive to positive and active learning.
- To engage learners actively in the learning process by recognizing their personal experience and ability.

**(ii) Extra- and co-curricular activities**
- Identification and assistance of matters requiring special attention in the school situation regarding learners.
- To ensure educational and general welfare of learners in the educator's care.
- Active involvement in learner guidance, discipline, counselling and career information.
- Organizing and conducting extra- and co-curricular activities.

**(iii) Administrative**
- Academic administration
- Equipment and stock administration
- Assistance with administrative activities, for example collection of fees and other monies, secretarial duties, setting of time tables.

**(iv) Health and safety**
- Ensuring healthy conditions and safety of learners and colleagues.
- Reporting of any problems regarding health and safety in the school situation
- Active participation in fire drills and first aid.

**(v) Interaction with stakeholders**
- Participation in appraisal procedures.
- Professional development of colleagues by sharing knowledge, ideas and resources.

- To stay abreast of the times with developments and changes in education influencing the learning process.
- If elected, to serve on the SGB.

**(vi) Communication**

- Co-operation with all colleagues to ensure the maintenance of good teaching standards and administrative efficiency in the school.
- Collaboration with educators of other schools regarding the overall teaching task.
- Meeting of parents to discuss the conduct and / or progress of learners.
- Participation in departmental committees, seminars and courses to update personal standards and professional views.
- Contact with sport, social, cultural and community organizations.
- Contact with the public on behalf of the school principal if required to do so.

**D. REPORTING STRUCTURE**

| Academic | Sport | Culture | Administrative | General chain of command |
|---|---|---|---|---|
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**E. USAGE OF SPECIFIC EQUIPMENT AND MATERIAL**

_____

_____

_____

_____

_____

_____

**F. PERSONALISED DUTY SHEET**

**(i) Academic**

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

**(ii) Administrative**

_____

_____

_____

_____

_____

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_____

**(iii) Sport**

_____

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_____

**(iv) Cultural**

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**(v) Leadership roles**

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**(vi) General**

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## G. AGREEMENT

Confirmation by educator and school principal that the job description is a true reflection of the current requirement of the post.

Educator: Initials and surname _____

        Signature _____

        Date _____

School principal: Initials and surname _____

        Signature _____

        Date _____

(Free State Department of Education Management and Governance Circular 58, 2002a:s.a.; Department of Agriculture:1-3 and Schultz, 2001a:206).

# APPENDIX E

# PROFILE OF WALK-INS AND WRITE-INS

# PROFILE OF WALK-INS AND WRITE-INS

DATE OF FIRST CONTACT WITH THE PERSON: _____

1.  BIOGRAPHICAL INFORMATION

1.1  Initials and Surname: _____

1.2  Telephone numbers:   (H)     _____

                       (W)     _____

                    (Cell)     _____

1.3  Particulars of present position:

_____

_____

2.  PERSONAL IMPRESSIONS

2.1  Why does the person apply for the post? _____

_____

_____

_____

2.2   Is the person willing to accept an SGB post?

| YES | | NO | | ONLY SGB POST |
|-----|-----|-----|-----|-----|

2.3   Learning areas and phases that the person can present? _____

_____

_____

2.4   Extra-mural possibilities of the person? _____

_____

2.5   General impressions

| Very weak | | Weak | | Average | | Good | | Very good |
|-----------|-----|------|-----|---------|-----|------|-----|-----------|

2.6   General remarks: _____
_____
_____
_____
_____
_____
_____
_____

3.   CONTACT WITH PERSON REGARDING POSSIBLE POST FILLING
    (Indicate complete details)
_____
_____
_____
_____
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# APPENDIX F

# CHECKLIST FOR INDUCTION

# CHECKLIST: INDUCTION PROCESS FOR EDUCATORS

**NAME OF EDUCATOR:** _____

| NO | CHECKLIST | NAME OF OFFICIAL | DATE COMPLETED |
|----|-----------|------------------|----------------|
| 1 | School principal | | |
| 2 | Grade manager | | |
| 3 | Academic manager | | |
| 4 | Learning area manager | | |
| 5 | Sport manager | | |
| 6 | Culture manager | | |
| 7 | Administrative manager | | |
| 8 | Financial official | | |
| 9 | Hostel warden | | |
| 10 | Terrain manager | | |

_____

Signature: Chairperson induction
committee

_____

Signature (new staff member)

_____

Signature: School principal

# INDUCTION PROCESS FOR EDUCATORS

## 1. INDUCTION BY SCHOOL PRINCIPAL

|        | SUBJECT                          | DATE COMPLETED | REMARKS |
|--------|----------------------------------|----------------|---------|
| (i)    | School history                   |                |         |
| (ii)   | School culture                   |                |         |
| (iii)  | Chain of command                 |                |         |
| (iv)   | Professional relationship        |                |         |
| (v)    | Place of school in the community |                |         |
| (vi)   | Vision of the school             |                |         |
| (vii)  | Mission of the school            |                |         |
| (viii) | General job description          |                |         |
| (ix)   | Presentation to staff            |                |         |
| (x)    | Follow-up of first school day    |                |         |
| (xi)   | Follow-up of first week          |                |         |
| (xii)  | Follow-up of first month         |                |         |
| (xiii) | Follow-up of first term          |                |         |

## 2. INDUCTION BY SENIOR STAFF MEMBER

|       | SUBJECT                   | DATE COMPLETED | REMARKS |
|-------|---------------------------|----------------|---------|
| (i)   | Explain mentorship        |                |         |
| (ii)  | General discipline        |                |         |
| (iii) | General finances          |                |         |
| (iv)  | Professional relationship |                |         |
| (v)   | Emergency plan and safety |                |         |

## 3. INDUCTION BY GRADE MANAGER

|        | SUBJECT                                         | DATE COMPLETED | REMARKS |
|--------|-------------------------------------------------|----------------|---------|
| (i)    | Presentation to grade colleagues                |                |         |
| (ii)   | Academic organisation                           |                |         |
| (iii)  | Use of equipment<br>• photocopiers<br>• telephones<br>• staff fund<br>• lay-out of school |                |         |
| (iv)   | Disciplinary management system of the school    |                |         |
| (v)    | Classroom management according to school policy |                |         |
| (vi)   | Complete job description                        |                |         |
| (vii)  | Personal duty sheet                             |                |         |
| (viii) | Introduction to staff manual                    |                |         |
| (ix)   | Treatment of parents                            |                |         |

## 4.  INDUCTION BY ACADEMIC MANAGER

|  | SUBJECT | DATE COMPLETED | REMARKS |
|---|---|---|---|
| (i) | Handing over policy documents | | |
| (ii) | Explanation of policy documents | | |
| (iii) | General academic policy | | |
| (iv) | Assessment guidelines | | |
| (v) | Academic management and authority channels | | |
| (vi) | Overview of academic experience | | |
| (vii) | Introduction to Learning Area managers | | |

## 5.  INDUCTION BY LEARNING AREA MANAGER(S)

|  | SUBJECT | DATE COMPLETED | REMARKS |
|---|---|---|---|
| (i) | Discussion of learning area policy | | |
| (ii) | Evaluate academic competency | | |
| (iii) | Learning area assessment discussed | | |
| (iv) | Time management in teaching | | |

## 6.  INDUCTION BY SPORTS MANAGER

|  | SUBJECT | DATE COMPLETED | REMARKS |
|---|---|---|---|
| (i) | Introduction to sports code managers | | |
| (ii) | Introduction to sports codes | | |
| (iii) | Determine person's interest | | |
| (iv) | Explain sports programme | | |
| (v) | Sportswear of coaches | | |
| (vi) | Training needed | | |
| (vii) | Supplies management | | |
| (viii) | First-aid qualification | | |
| (ix) | Safety aspects regarding sport | | |
| (x) | Professional conduct of coaches | | |

### 7. INDUCTION BY CULTURE MANAGER

|       | SUBJECT | DATE COMPLETED | REMARKS |
|-------|---------|----------------|---------|
| (i)   | Presentation of culture code managers | | |
| (ii)  | Introduction to culture codes | | |
| (iii) | Determine person's interest | | |
| (iv)  | Explain cultural programme | | |
| (v)   | Training needed | | |
| (vi)  | Supplies management | | |
| (vii) | Professional conduct of coaches | | |

### 8. INDUCTION BY ADMINISTRATIVE MANAGER

|       | SUBJECT | DATE COMPLETED | REMARKS |
|-------|---------|----------------|---------|
| (i)   | Staff employment requirements<br>• Leave<br>• Housing subsidy<br>• Salary advices<br>• Complete personal file | | |
| (ii)  | Presentation to administrative staff and their functions | | |
| (iii) | Supplies management | | |
| (iv)  | Typing | | |
| (v)   | Office procedures | | |
| (vi)  | Learning area administration | | |
| (vii) | Policy structure in the office | | |

### 9. INDUCTION BY FINANCIAL OFFICIAL

|       | SUBJECT | DATE COMPLETED | REMARKS |
|-------|---------|----------------|---------|
| (i)   | Handling of cash | | |
| (ii)  | Receipt book management | | |
| (iii) | Reporting of monetary shortages | | |
| (iv)  | Documentation administration | | |
| (v)   | Management of purchases | | |
| (vi)  | Personal claims | | |

## 10. INDUCTION BY HOSTEL WARDEN

|       | SUBJECT | DATE COMPLETED | REMARKS |
|-------|---------|----------------|---------|
| (i)   | Liaison procedure between school and hostel | | |
| (ii)  | Handling hostel learner problems | | |
| (iii) | Role of the hostel in school | | |
| (iv)  | Presentation to hostel staff | | |
| (v)   | Visit to hostel | | |
| (vi)  | Chain of command | | |

## 11. INDUCTION BY TERRAIN MANAGER

|        | SUBJECT | DATE COMPLETED | REMARKS |
|--------|---------|----------------|---------|
| (i)    | Presentation of terrain staff | | |
| (ii)   | Key control | | |
| (iii)  | Supplies management | | |
| (iv)   | Handling of equipment | | |
| (v)    | Handling of dangerous substances | | |
| (vi)   | Dangerous substances on terrain | | |
| (vii)  | Use of vehicles | | |
| (viii) | Reporting breakages | | |
| (ix)   | Chain of command | | |
| (x)    | Fire extinguisher training | | |

# APPENDIX G

# CAREER MANAGEMENT:  PHASE 1

**CAREER MANAGEMENT**

Name: _____

Persal No.: _____

Post Description: _____

**PHASE I: WHERE AM I NOW?**

**STEP 1: Draw a career line depicting past, present and expected future of your career.**

**High**

**S**

**U**

**C**

**C**

**E**

**S**

**S**

**Low**

**Past**                                **Present**                                **Future**
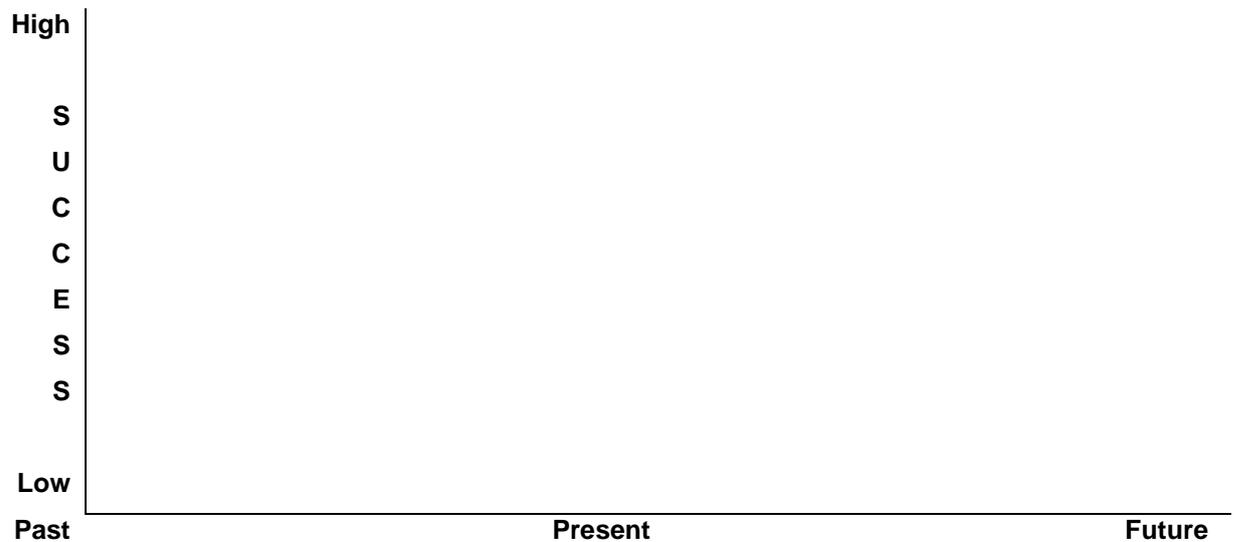
**STEP 2: List ± 20 adjectives describing you the most accurately with regard to your career.**

1. _____    11. _____
2. _____    12. _____
3. _____    13. _____
4. _____    14. _____
5. _____    15. _____
6. _____    16. _____
7. _____    17. _____
8. _____    18. _____
9. _____    19. _____
10. _____    20. _____

**STEP 3:   Regroup your career list of adjectives into the following categories:**

| Positive | Neutral | Negative |
|----------|---------|----------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

# APPENDIX H

# CAREER MANAGEMENT: PHASE 2

**CAREER MANAGEMENT**

Name: _____

Persal No.: _____

Post Description: _____

**PHASE 2:   WHERE DO I WANT TO BE?**

**STEP 1:   Write down 10 objectives for your future career thinking free and wide!**

| Objectives | Ranking (see Step 2) |
|---|---|
| 1. _____ | _____ |
| 2. _____ | _____ |
| 3. _____ | _____ |
| 4. _____ | _____ |
| 5. _____ | _____ |
| 6. _____ | _____ |
| 7. _____ | _____ |
| 8. _____ | _____ |
| 9. _____ | _____ |
| 10. _____ | _____ |

**STEP 2:   Prioritise your career objectives by ranking them on a 4-point scale, using the following division:**

| | | |
|---|---|---|
| **4** | **=** | **of little importance** |
| **3** | **=** | **of moderate importance** |
| **2** | **=** | **of great importance** |
| **1** | **=** | **of very great importance** |

# APPENDIX I

# CAREER MANAGEMENT: PHASE 3

## CAREER MANAGEMENT

Name: _____

Persal No.: _____

Post Description: _____

## PHASE 3:   HOW DO I GET THERE?

**STEP 1:   Choose 3 of the very important objectives marked with a 1 that has a cardinal influence on your career and write them down.**

Objective 1: _____

Objective 2: _____

Objective 3: _____

**Step 2:   Formulation of action plans for each to achieve the stated objectives individually**

## ACTION PLAN

**(i)   Statement of objectives**

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

**(ii)   How shall I benefit from achievement of this objective?**

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

**(iii)**

| <u>**Possible obstacles**</u> | <u>**Strategies to overcome possible obstacles**</u> |
|---|---|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

**(iv) Specific actions to reach objectives**

| | Description | Target date | Achieved |
|---|---|---|---|
| 1. | 522 | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |
| 6. | | | |
| 7. | | | |
| 8. | | | |
| 9. | | | |
| 10. | | | |
| 11. | | | |
| 12. | | | |
| 13. | | | |
| 14. | | | |
| 15. | | | |

Does it justify the time, effort and money to achieve the objective?  Yes ☐  No ☐

**(v) Affirmations to support the objectives**

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

# APPENDIX J

# GENERAL QUESTIONNAIRE REGARDING
# HEALTH AND SAFETY MANAGEMENT

**GENERAL QUESTIONNAIRE REGARDING HEALTH AND SAFETY MANAGEMENT**

| | <u>Question</u> | <u>YES</u> | <u>NO</u> |
|---|---|---|---|
| 1. | <u>Registration</u><br>Is the school registered with the Department of Labour with regard to SGB appointments concerning the: | | |
| | 1.1    Compensation for Occupational Injuries and Diseases Act? | YES | NO |
| | 1.2    Unemployment Insurance Act? | YES | NO |
| | | | |
| 2. | <u>Occupation Health and Safety Act, 85 of 1993</u> | | |
| | 2.1    Is a copy of the Act available at school? | YES | NO |
| | 2.2    Do employees have access to the Act, if available? | YES | NO |
| | | | |
| 3. | <u>Health and Safety Committee</u> | | |
| | 3.1    Does the school have a Health and Safety committee in place? | YES | NO |
| | 3.2    Are all the sections of the school represented on the Health and Safety committee? | | |
| | 3.2.1   SGB | YES | NO |
| | 3.2.2   Educators | YES | NO |
| | 3.2.3   Administrative | YES | NO |
| | 3.2.4   Maintenance | YES | NO |
| | 3.2.5   Pre-Primary (if applicable) | YES | NO |
| | 3.2.6   Hostel (if applicable) | YES | NO |
| | 3.2.7   Farm workers (if applicable) | YES | NO |
| | 3.2    Have Health and Safety representatives been appointed for all sections of the school? | YES | NO |
| | | | |
| 4. | Is the whole staff trained to recognise and to respond to health and safety issues? | YES | NO |

| 5. | Facilities | | | |
|----|------------|---|----|----|
| | 5.1 | Are clean and hygienic toilet and washing facilities available for men and women? | YES | NO |
| | 5.2 | Are tearoom facilities available at school for all staff categories? | YES | NO |

| 6. | Emergency plan | | | |
|----|----------------|---|----|----|
| | 6.1 | Does the school have an emergency plan? | YES | NO |
| | 6.2 | Is the emergency plan regularly practised? | YES | NO |
| | 6.3 | Are all parties trained to respond to the emergency plan? | YES | NO |
| | 6.4 | Are written reports kept regarding emergency plan practices? | YES | NO |

Report completed by:

_____    _____    _____    _____
Name                    Signature             Rank              Date

| Are you the principal Health and Safety Officer of the school? | YES | NO |
|---|---|---|

| Has this report been represented to the SGB? | YES | NO |
|---|---|---|

Actions taken

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

# APPENDIX K

# CHECKLIST FOR HEALTH MANAGEMENT

## CHECKLIST FOR HEALTH MANAGEMENT

| **Item** | **Yes / No** | | **Remarks** |
|---|---|---|---|
| 1.    Are the following policies in place? | | | |
| 1.1  Aids policy | Yes | No | |
| 1.2  Substance abuse policy | Yes | No | |
| 1.3  First-aid policy | Yes | No | |
| | | | |
| 2.    Aids management | | | |
| 2.1  Are staff aware of the contents of the Aids policy of the school? | Yes | No | |
| 2.2  Have all been trained regarding Aids in the workplace? | Yes | No | |
| 2.3  Are staff aware of the rights of people living with Aids? | Yes | No | |
| | | | |
| 3.    Substance abuse management | | | |
| 3.1  Are staff aware of reporting structures within the school regarding substance abuse? | Yes | No | |
| 3.2  Have staff been trained to identify symptoms of substance abuse? | Yes | No | |
| | | | |
| 4.    First-aid management | | | |
| 4.1  Does the school have a medicine register? | Yes | No | |
| 4.2  Is the register properly checked by a senior member of staff? | Yes | No | |
| 4.3  Are there enough first-aid kits available in the school? | | | |
|       4.3.1   General first aid | Yes | No | |
|       4.3.2   Sports activities | Yes | No | |
|       4.3.3   Hostel | Yes | No | |
|       4.3.4   Maintenance staff | Yes | No | |
|       4.3.5   School vehicles | Yes | No | |
| 4.4  Do the first-aid kits comply with the requirement of the Occupational Health and Safety Act, 85 of 1993? | Yes | No | |
| 4.5  How many staff members are trained in first-aid? | | | |
| 4.6  Are their qualifications still valid? | Yes | No | |
| 4.7  Are enough staff members training to service all critical areas in the school? | Yes | No | |
| 4.8  Are the storage places of first-aid kits clearly marked? | Yes | No | |

| 5. | School wellness programmes | | | |
|---|---|---|---|---|
| 5.1 | Are there any school wellness programmes in place to assist staff? | | | |
| | 5.1.1 Substance abuse | Yes | No | |
| | 5.1.2 Stress | Yes | No | |
| | 5.1.3 Healthy life style guidance | Yes | No | |
| | 5.1.4 Smoking policy | Yes | No | |
| | 5.1.5 Information regarding life threatening diseases | Yes | No | |
| 5.2 | Are there any members of staff suffering from any of the above-mentioned? | Yes | No | |
| 5.3 | Has this been handled professionally? | Yes | No | |

| 6. | Hygiene management | | | |
|---|---|---|---|---|
| 6.1 | Are toilet facilities regularly inspected in terms of hygiene? | Yes | No | |
| 6.2 | How regularly? | | | |
| 6.3 | Has the situation worsened or improved? | Worse | Better | |

| 7. | Ventilation | | | |
|---|---|---|---|---|
| 7.1 | Are facilities being properly ventilated? | Yes | No | |

| 8. | Hazardous chemicals | | | |
|---|---|---|---|---|
| 8.1 | Do staff work with dangerous chemicals | Yes | No | |
| 8.2 | Are the necessary precautions in place to protect their health? | Yes | No | |

Report completed by Health and Safety Officer of school.
Remarks and action taken: _____
_____
_____
_____
_____

_____        _____        _____
Print Name                                            Signature                                      Date

School principal's report: _____
_____
_____
_____
_____

_____        _____        _____
Print Name                                            Signature                                      Date

SGB report: _____
_____
_____
_____
_____

_____        _____        _____
Chairperson: Print Name                           Signature                                      Date

# CHECKLIST L

# CHECKLIST FOR SAFETY MANAGEMENT

# CHECKLIST FOR SAFETY MANAGEMENT

| Item | In order Yes / No | | Remarks |
|---|---|---|---|
| **CLASSROOMS (No.　　　　　)** | | | |
| (i) Door and lock | Yes | No | |
| (ii) Electrical wiring covered | Yes | No | |
| (iii) Equipment used | Yes | No | |
| (iv) Floor | Yes | No | |
| (v) Furniture | Yes | No | |
| (vi) General interior | Yes | No | |
| (vii) Heating equipment | Yes | No | |
| (viii) Light fittings | Yes | No | |
| (ix) Light switches | Yes | No | |
| (x) Plugs | Yes | No | |
| (xi) Safety of hanging items | Yes | No | |
| (xii) Windows | Yes | No | |
| | | | |
| **SCHOOL HALL** | | | |
| (i) Chairs and other furniture | Yes | No | |
| (ii) Doors and locks | Yes | No | |
| (iii) Electrical board | Yes | No | |
| (iv) Electrical wiring covered | Yes | No | |
| (v) Emergency exits marked and accessible | Yes | No | |
| (vi) Equipment used (general) | Yes | No | |
| (vii) Floor | Yes | No | |
| (viii) Fire extinguishers accessible and serviced | Yes | No | |
| (ix) General interior | Yes | No | |
| (x) Light fittings | Yes | No | |
| (xi) Light switches | Yes | No | |
| (xii) Plugs | Yes | No | |
| (xiii) Safety of hanging items | Yes | No | |
| (xiv) Stage floor, steps and hand railings | Yes | No | |
| (xv) Stage lights and equipment | Yes | No | |
| (xvi) Windows | Yes | No | |
| | | | |
| **TOILET FACILITIES** | | | |
| (i) Doors and locks (including toilet doors) | Yes | No | |
| (ii) Electrical wiring covered | Yes | No | |
| (iii) Floor | Yes | No | |
| (iv) General interior | Yes | No | |
| (v) Lights fittings | Yes | No | |
| (vi) Light switches | Yes | No | |
| (vii) Safety of hanging items | Yes | No | |
| (viii) Toilet pots | Yes | No | |
| (ix) Toilet seats | Yes | No | |
| (x) Windows | Yes | No | |

| OFFICE BLOCK | | | | |
|------|-----------------------------|-----|----|--|
| (i) | Computer equipment | Yes | No | |
| (ii) | Doors, locks and safety doors | Yes | No | |
| (iii) | Electrical wiring covered | Yes | No | |
| (iv) | Floors and loose carpets | Yes | No | |
| (v) | Furniture | Yes | No | |
| (vi) | General interior | Yes | No | |
| (vii) | Light fittings | Yes | No | |
| (viii) | Light switches | Yes | No | |
| (ix) | Plugs | Yes | No | |
| (x) | Safety of hanging items | Yes | No | |
| (xi) | Windows | Yes | No | |

| FIRE EXTINGUISHERS | | | | |
|------|-----------------------------|-----|----|--|
| (i) | Equipment checked | Yes | No | |
| (ii) | Placement of equipment | Yes | No | |
| (iii) | Staff trained to use equipment | Yes | No | |

# APPENDIX M

# REPORT OF ACCIDENTS OR INJURIES

# REPORT OF ACCIDENTS OR INJURIES

Date: _____

Time: _____

Place: _____


Describe the situation in full:

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____


Persons involved:

_____     _____     _____
_____     _____     _____
_____     _____     _____
_____     _____     _____
_____     _____     _____
_____     _____     _____


Car registrations

_____     _____     _____
_____     _____     _____


Witnesses

_____     _____     _____
_____     _____     _____
_____     _____     _____


Report compiled by:

_____     _____     _____
Print name              Position at school      Signature