

PRINCIPALS' NARRATIVES ON BALANCING LEADERSHIP, MANAGEMENT AND INSTRUCTION IN SOUTH AFRICAN SCHOOLS

by

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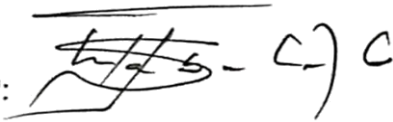
DECLARATION

I, Thokolosi John Tshabalala, declare that the Doctoral Degree research that I hereby submit for the Doctoral qualification (PhD) in Education degree at the University of the Free State, is my independent work and that I have not previously submitted it for a qualification at another institution of higher education.

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Date: 15 November 2020.

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SPECIAL DEDICATION

I would like to dedicate this study to my late mother, Mosele Mathapelo Elizabeth Tshabalala. I thank you “Mami” for believing in me since birth. You always reminded me that I wanted to be a doctor one day, and I know that you wanted me to achieve this dream. I may not have become the medical doctor you envisaged, but this is where I am right now by the grace of God. I will forever be indebted to you. May your beautiful soul rest in eternal peace.

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ABSTRACT

Background: The role that a Principal plays in a school has become very complicated and very demanding. Scholars such as Fullan (1991) have been following the changing trends in Education and are convinced that the part played by the Principals in schools has truly been evolving, transcending from being instructional leaders to transactional leaders, and now lately to transformational leaders. Mestry (1999) asserts that Principals' expectations have evolved from focus on management and control, to that of being entrusted with the responsibility to develop staff, encourage and increase parental involvement, and soliciting community support and learner achievement. This is supported by Blasé, Blasé and Phillips (2010), where they maintain that new responsibilities and activities have been compounded on the already demanding roles Principals currently have. On the other hand, Naicker and Mestry (2013) argue that the role of Principals have become riddled with controversy involving conflicting demands. Earlier studies by Hallinger and Murphy (1985) reveal that one of the main challenges of Principals was to establish balance between administrative roles and instructional leadership functions. They assert that one person cannot fulfil all the duties of a Principal, and go further to suggest that there was a need for empowering others to exercise leadership (Spillane, 2012; Katewa & Heystek, 2019; Peters-Hawkins, Reed & Kingsberry, 2018). Hence this study sought to answer the research question: How do Principals go about carrying out their dual mandate as instructional leaders and managers in South African schools? It is intended to explore how other Principals succeed and others do not, and what is it that sets them apart.

Research methodology: This study is rooted in instructional leadership as a framework, using grounded theory, following interpretive paradigm. I followed a qualitative research methodology through the multiple case-study design (Creswell, 2013). Data were collected through observations, interviews, and documents analysis.

Sampling: Four school Principals, purposively selected from prominently high-performing secondary schools in two provinces, the Free State and Gauteng, took part.

Findings: In a nutshell, the policies on which the Principals relied appear to represent a mixed bag, with some providing more of an enabling context for them to balance the management and instructional leadership demands with some degree of success. The same policies, however, sometimes compound their ability to successfully navigate this balance in their schools. The findings also suggest that mounting pressure is being exerted inadvertently on school Principals to focus on Grade 12 learners' performance, and that Principals rely on the teachers in their staff to volunteer their services beyond the normal school day programme. The study recommends that school principals undergo counselling in order to deal with the high stress levels they encounter on daily basis.

Key words: Principals, Instructional leadership, Distributed leadership, Policies and Structures.

ABBREVIATIONS/ACRONYMS

ATP	-	Annual Teaching Plan
CAPS	-	Curriculum Assessment and Policy Statement
CMM	-	Curriculum Management and Monitoring
DBE	-	Department of Basic Education
DoE	-	Department of Education
FET	-	Further Education and Training
GET	-	General Education and Training
HOD	–	Head of Department
IQMS	–	Integrated Quality Management System
LTSM	–	Learning and Teaching Support Material
MEO	–	Multiple Examinations Opportunity
NCS	-	National Curriculum Statement
NEEDU	–	National Education Evaluation and Development Unit
NGO	–	Non-Governmental Organisation
PLC	-	Professional Learning Community
RCL	-	Representative Council for Learners
SANRAL	-	South African National Roads Agency Limited
SAT	-	School Assessment Team
SAPS	–	South African Police Service
SADTU	–	South African Democratic Teachers Union
SBST	-	School-based Support Team
SGB	-	School Governing Body
SDP	–	School Development Plan
SMT	-	School Management Team

TABLE OF CONTENTS

DECLARATION	I
ACKNOWLEDGEMENTS	II
SPECIAL DEDICATION.....	III
ABSTRACT	IV
ABBREVIATIONS/ACRONYMS	VI
LIST OF TABLES	XIII
LIST OF FIGURES.....	XIV
CHAPTER 1 : ORIENTATION AND BACKGROUND TO THE STUDY	1
1.1 INTRODUCTION	1
1.2 BACKGROUND	3
1.3 PROBLEM STATEMENT.....	7
1.4 RESEARCH QUESTIONS.....	8
1.5 AIMS AND OBJECTIVES	9
1.6 PURPOSE AND SIGNIFICANCE OF THE STUDY.....	9
1.7 THEORETICAL FRAMEWORK	11
1.7.1 Research methodology	12
1.8 DELIMITATIONS	13
1.9 LIMITATIONS	13
1.10 DEFINITION OF KEY TERMS	14
1.11 CHAPTER OUTLINE	15
1.12 CHAPTER SUMMARY	16
CHAPTER 2: LITERATURE REVIEW	18
2.1 INTRODUCTION	18
2.2 LEADERSHIP	19
2.3 LEADERSHIP AND MANAGEMENT	23
2.4 MANAGEMENT	24

2.5	LEADERSHIP AS A COMPETENCE	27
2.6	INTERNATIONAL LITERATURE REVIEW ON SUCCESSFUL LEADERSHIP	30
2.7	INSTRUCTIONAL LEADERSHIP	32
2.8	THE CHANGING ROLES OF PRINCIPALS	35
2.9	CHARACTERISTIC BEHAVIOURS OF INSTRUCTIONAL LEADERS	40
2.10	REQUIREMENTS FOR STRONG INSTRUCTIONAL LEADERSHIP	41
2.11	DISTRIBUTED LEADERSHIP	42
2.11.1	Effective distributed leadership factors	47
2.11.2	Standards for head teachers in England (DFE, 2015)	51
2.11.3	South African Standard for Principalship (RSA, 2017)	51
2.11.4	Shared leadership	54
2.12	CONCLUSION	56
CHAPTER 3: RESEARCH METHODOLOGY		57
3.1	INTRODUCTION	57
3.2	RESEARCH QUESTIONS	57
3.3	PURPOSE OF THE STUDY	58
3.5	RATIONALE FOR QUALITATIVE RESEARCH	60
3.7	RATIONALE FOR CASE STUDY DESIGN	62
3.8	SAMPLING	65
3.8.1	Change in the sample size	66
3.8.2	Sampling techniques and procedures	67
3.9	DATA COLLECTION	68
3.9.1	Interviews	68
3.9.2	Observations	70
3.9.3	Document analysis	72
3.10	POSITION OF THE RESEARCHER	73
3.11	ETHICAL CONSIDERATIONS	74
3.11.1	Confidentiality and anonymity	75
3.11.2	Informed consent	75

3.11.3 Access and acceptance	75
3.12 DATA ANALYSIS.....	76
3.13 VALIDITY	78
3.14 LIMITATIONS	80
3.15 CHAPTER SUMMARY	80
CHAPTER 4: DATA PRESENTATION, ANALYSIS AND DISCUSSION	82
4.1 INTRODUCTION	82
4.2 POLICIES AND LEGISLATIVE FRAMEWORK AFFECTING PRINCIPALS' WORK	84
4.2.1 The Constitution of the Republic of South Africa (RSA, 1996).....	85
4.2.2 National Curriculum Statement (NCS)	85
4.2.3 National Education Policy Act (NEPA) (Act 27 of 1996)	86
4.2.4 Employment of Educators Act (Act 76 of 1998).....	87
4.2.5 The South African Schools Act (Act 84 of 1996)	88
4.2.6 Policy on Access to Schools – Learner attendance (RSA, 1996: B-66).....	90
4.2.7 The Integrated Quality Management System (IQMS).....	91
4.2.8 Labour Relations Act (Act no 66 of 1995).....	93
4.3 STRUCTURES THAT PROMOTE INSTRUCTIONAL LEADERSHIP IN A SCHOOL	95
4.3.1 School Governing Body (SGB).....	95
4.3.2 The School Management Team (SMT)	96
4.3.3 Representative Council for Learners (RCL)	97
4.3.4 School-based Support Team (SBST).....	97
4.3.5 School Assessment Team (SAT)	98
4.3.6 School Committees.....	98
4.4 BIOGRAPHICAL BACKGROUND AND NARRATIVES.....	100
4.4.1 The story of Mr Mosiuwa.....	101
4.4.1.1 Presenting Mr Mosiuwa – “Managing by walking-about”.....	101
4.4.1.2 Mosiuwa High School profile	103
4.4.1.3 The narratives	104

4.4.2 The story of Mrs Mathapelo	131
4.4.2.1 Mrs Mathapelo's Profile – "The outspoken one"	131
4.4.2.2 Mathapelo High School profile	132
4.4.2.3 The narratives	133
4.4.3 The story of Mr Gomolemo	147
4.4.3.1 Presenting Mr Gomolemo – Mr Clean, leading by example	147
4.4.3.2 Gomolemo High School profile	148
4.4.3.3 Narratives.....	150
4.4.4 The story of Mr Sonny.....	170
4.4.4.1 Presenting Mr Sonny – "The loud mouthed exemplary leader"	170
4.4.4.2 Sonny High School profile	171
4.4.4.3 Narratives.....	171
4.5 DISCUSSION	194
CHAPTER 5: CROSS CASE ANALYSIS: THE COMMON AND THE DIVERSE.....	199
5.1 INTRODUCTION	199
5.2 FINDINGS FROM THE LITERATURE REVIEW: A RECAP.....	200
5.2.1 The roles and responsibilities of school principals.....	201
5.2.1.1 Instructional leadership.....	201
5.2.1.2 Distributed leadership.....	202
5.3 CROSS-CASE NARRATIVE ANALYSIS AND INTERPRETATION	202
5.3.2 Policies that guide the work of school principals	203
5.3.3 Structures and resources	207
5.3.3.1 Existing structures	207
5.3.3.2 Functionality of structures and the role of individual members	207
5.3.3.3 Available resources	208
5.3.4 Day-to-day practice.....	209
5.3.4.1 Day-to-day activities – Knowledge and skills to lead instruction.....	209
5.3.4.2 Managerial skills and leadership competence.....	211
5.3.4.3 Planning	212
5.3.4.4 Challenges experienced	213
5.3.4.5 Success drivers	215
5.3.4.6 Instructional leadership and distributed leadership	217
5.3.4.7 Target setting	218

5.4	DISCUSSION SUMMARY	219
CHAPTER 6 FINDINGS, RECOMMENDATIONS AND CONCLUSION		226
6.1	INTRODUCTION	226
6.2	AIM OF THE STUDY	227
6.3	OVERVIEW OF THE STUDY	227
6.4	SUMMARY OF FINDINGS	230
6.4.1	Main findings	231
6.4.1.1	<i>Policies as constraints and enablers.....</i>	<i>231</i>
6.4.1.2	<i>Aligning structure and function for balanced school leadership.....</i>	<i>236</i>
6.4.1.3	<i>Practices of school leaders: instructional leadership and the supervision of “curriculum delivery”.....</i>	<i>238</i>
6.4.1.4	<i>Balance</i>	<i>238</i>
6.4.1.5	<i>Psycho-social effects.....</i>	<i>239</i>
6.6	DISTRIBUTED LEADERSHIP	244
6.7	RECOMMENDATIONS.....	248
6.7.1	Recommendations on policy	248
6.7.2	Recommendations for further research	249
6.8	LIMITATIONS OF THE STUDY	250
6.9	CONTRIBUTION TO RESEARCH AND SCHOLARSHIP	251
6.10	CONCLUSION.....	256
REFERENCES.....		259
APPENDIX 1: OBSERVATION PROTOCOL/SCHEDULE		288
APPENDIX 2: OBSERVATION NOTES GUIDE/TOOL		289
APPENDIX 3: INTERVIEW QUESTIONS PROTOCOL		290
APPENDIX 4: ANALYTICAL FRAMEWORK		291
APPENDIX 5: DOCUMENT AND POLICY CHECK LIST PROTOCOL.....		292
APPENDIX 6: GDE RESEARCH APPROVAL LETTER.....		294
APPENDIX 7: APPROVAL BY FREE STATE DEPARTMENT OF EDUCATION		295

APPENDIX 8: ETHICAL CLEARANCE CERTIFICATE	296
APPENDIX 9: LETTER TO PRINCIPALS.....	297
APPENDIX 10: DECLARATION BY LANGUAGE EDITOR	300
APPENDIX 11: PLAGIARISM REPORT.....	301

LIST OF TABLES

Table 2.1: Leadership and management (Management and Leadership Handbook [Fasset, 2012:10])	26
Table 2.2: Collective Responsibility Chain (Robinson <i>et al.</i> , 2009:126)	45
Table 3.1: Research methodology overview	58
Table 4.1: Summary of themes.....	84
Table 4.2: Participants' profiles and background information	100
Table 4.3: Some of the key school committees at the school (used pseudonyms).....	119
Table 4.4: Development workshop programme (Primary data)	131
Table 4.5: Summary of themes, sub-themes and categories	134
Table 4.6: Summary of themes, sub-themes and categories	151
Table 4.7: Summary of themes, sub-themes and categories	173
Table 5.1: Participants' background.....	199
Table 5.2: Summary of Themes	203
Table 5.3: Summary of similarities and differences.....	219
Table 6.1: Summary of key performance areas for school principals (DBE, 2015).....	253

LIST OF FIGURES

Figure 4.1: Diagram depicting the interrelatedness of the three programmes	92
Figure 4.2: The stages (cycle) of IQMS implementation (Photo by TJ Tshabalala)	93
Figure 4.3: Graph showing Grade 12 results for five years	103
Figure 4.4: Promotion and Progression requirements (Extract from Departmental Report)	112
Figure 4.5: Daily attendance register for educators (Photo by TJ Tshabalala)	114
Figure 4.6: Demarcation of blocks and allocation of grade heads.....	117
Figure 4.7: Syllabi coverage monitoring tool.....	121
Figure 4.8: Ceilings about to fall	127
Figure 4.9: Fallen ceilings.....	127
Figure 4.10: Damaged toilets.....	128
Figure 4.11: Roster of extra classes (Primary data)	130
Figure 4.12: Graph showing Grade 12 results over 5 years.....	133
Figure 4.13: The outside – while teaching and learning is taking place in the classrooms .	141
Figure 4.14: Some of the sporting facilities at the school (Photo taken by T J Tshabalala)	142
Figure 4.15: Graph showing Grade 12 over five years.....	149
Figure 4.16: Monitoring tool for submission of registers (primary data).....	152
Figure 4.17: The handing over of the sports facilities. (Photo by T J Tshabalala)	158
Figure 4.18: Staff members playing after the handing over ceremony (By T J Tshabalala)	158
Figure 4.19: An extract from the year plan (Primary data)	163
Figure 4.20: Consolidated analysis of results	168
Figure 4.21: Graph depicting Grade 12 results over five years	171
Figure 4.22: Extract from the MEO circular (Primary data)	175

Figure 4.23: Meeting of the Grade 12 teachers with the principal (Photo by TJ Tshabalala)	178
Figure 4.24: The guard house built for the security at the gate (Photo by TJ Tshabalala)..	182
Figure 4.25: An example of a Matric improvement plan (Primary data).....	184
Figure 4.26: Extra classes programme	185
Figure 4.27: Some of the learners who received certificates for academic performance (Term 2).....	190
Figure 4.28: Top achievers on the notice board (Photo by TJ Tshabalala)	191
Figure 4.29: Extract from analysis of term results (Primary data).....	193
Figure 5.1: Extract from the Employment of educators Act	223
Figure 6.1: A model of the Key Performance Areas for Principals (KPA) (T J Tshabalala)	255

CHAPTER 1:

ORIENTATION AND BACKGROUND TO THE STUDY

1.1 INTRODUCTION

Plenty of work has been done on the critical and challenging nature of the role principals play at schools. Stringer and Hourani (2016) acknowledge and recognise the multiple way in which principals are required and expected to execute their responsibilities. Hallinger and Heck (1996) have identified many blank spots and blind spots in the understanding of leadership. They further explain the importance of the blank spot by arguing that it hinges on the deeper explanation of how school principals maintain those conditions that promote academic excellence in their schools. Most scholars' lamentation is about the importance of school leaders, their role as managers, and as leaders of instruction. Striking a balance between these key roles comes with various challenges, which I believe account for some of the differences between what is sometimes characterised as "performing" and "under-performing", "functional" and "dysfunctional" schools.

Leadership on its own is a very broad concept; however, when it comes to schools, Leithwood *et al.* (2007:38) posit that different forms of leadership are described in the literature using adjectives such as 'instructional', 'participative', 'democratic', 'transformational', 'moral', 'strategic', and the like. They argue that these labels primarily capture different stylistic or methodological approaches to accomplishing the same two essential objectives critical to any organisation's effectiveness: helping the organisation to set a defensible set of directions and influencing members to move in those directions (Leithwood *et al.*, 2007). Their assertions point to the fact that leadership can be both simple and complex at the same time. This study seeks to investigate the role of school principals in their endeavour to establish a balance between managing the schools and providing instructional leadership. The study will further illuminate the impact of structures, systems and resources in the act of balancing the roles of management and instructional leadership by the principals of various schools.

According to Sebastian et al., (2018:52), different pictures of school principals' work are explored in the literature, and include among others brief encounters, firefighting, and a sole leader who is fixated on administration. On the other hand, there is a very small knowledge base and literature about principals' practice. Most literature predates the quality and accountability processes that have radically changed the environment in most schools in the United States of America (and elsewhere). Educational leadership and management have to be concerned centrally with the purpose or aims of education (Spillane, Halverson & Diamond, 2010). Such purposes and goals give crucial direction to and support management of schools. Hence Bush's (2007) lamentation that, "unless the link between purpose and management is clear and close, there is a danger of 'managerialism', with a stress on procedures at the expense of educational purpose and values" (Bush, 1999:240). Critical skills associated with principals' instructional leadership include setting of goals, leading teaching and learning, conducting supervision and evaluation, teaching, developing staff, and managing resources. They also involve creating a positive and sustainable environment and raising high expectations for success (Daresh & Ching-Jan, 1985; Duke, 1987; Hallinger *et al.*, 1983)

A study conducted by Bush and Heystek (2006) has shown that out of all the principals who took part only 27,2% raised this topic as priority in their developmental needs. This study further found that school principals still do not imagine and accept themselves as leaders of what the learners are expected to learn (Bush, 2006). Considering the rapid developments in the management and governance of schools it is understandable that principals wish to prioritise financial and staff management, as well as the relationships with governing bodies. Bush (2007) goes further to emphasise that school improvement, depends on the school principals accepting that their responsibility is to develop learning (Bush, 2007).

The proposed study will generate narratives from a purposive sample of principals that are relatively successful to explore their approaches to school leadership, especially with respect to balancing the roles of management and instructional leadership. Hallinger and Heck (1996) are convinced that it is baseless to study the leadership of a principal and exclude the school context. Their argument is that "the context of the school is a source of constraints, resources and opportunities that must be understood

and addressed by the principal in order to lead effectively” (Hallinger, 2005:14). Other studies also support the assertion that principals hold essential positions in their schools with regards to establishing a positive school climate (Bellibas, Hughes & Picker, 2013; Randeree & Chaudhry, 2012).

This investigation attempts to bring together evidence and findings of many scholars of instructional leadership, with special reference to the principals in South Africa. Although the focus will be on top-performing schools, I am certain that conclusions arrived at in this study will add value to the ever changing educational contexts explored, and will contribute towards remodelling new perspectives on instructional leadership.

1.2 BACKGROUND

Since the new dispensation in South Africa, the education system has been under enormous pressure to transform particularly at policy level in order to engender a participative and collaborative practice of school leadership and management. Literature by Sarah Lawrence Lightfoot strongly affirms and asserts that most “literature tends to agree that an essential ingredient of good schools is strong, consistent and inspired leadership” (Lightfoot, 1983:323). Leadership in this context is viewed as a vehicle that generates and effects change in organisations, and it “mobilises members to think, believe, and behave in a manner that satisfies emerging needs, and not simply their individual needs or wants or the status quo” (Donaldson, 2006:7). He goes further to indicate that leadership guides the institution to acclimatise to its evolving responsibilities in the communities. The argument purported by Spillane *et al.* (2010), which centres on the notion of leadership being ‘critical to innovation in schools’ is very important. However, it is also fair to mention that both leadership and management complement each other, and may not be separated.

There is no question therefore that the function of the school principal has developed into being more complex and in many ways undoable (Fullan, 2008a). This is due to the high demands and expectations of school principals from all stakeholders. Willmore (2004) agrees that the duty of the principal is that of chief instigator of the learning community, a catalyst for change. This deepens the strong belief of most writers that principals more often stand in the gap. As leaders, principals carry the

responsibility of managing the school and the activities within, while primarily driving teaching and learning for the achievement and success of learners, who are the main beneficiaries of schooling.

Principals must learn how to balance their job and personal time before they realise they have nothing else to give physically, mentally or emotionally (Willmore, 2004). According to Hallinger (2005), one of the most disturbing factors pertaining to school leadership is when one tries to carry the weight alone. This is supported by Lambert (2002) when he asserts that the views that the principal is the sole instructional leader in the school and does not need the participation and input of other educators is outdated. According to Spillane and Mertz (2015), instructional leadership involves principals, deputy principals, heads of departments, and teachers. On the other hand, Naicker and Mestry (2013) recommend that all role players that contribute towards the determination of school outcomes should share accountability and responsibility. Hence Katewa and Heystek (2019) assert that distributed leadership is an essential component of instructional leadership because of the diversity and complexities in the school environment. There should therefore be an emphasis on a participatory and democratic process that requires the involvement other stakeholders in the practice of leadership (Katewa & Heystek, 2019).

According to Grant *et al.* (2010:403), leadership is underpinned by power and this is seen in the way individuals are 'positioned' in schools. Furthermore, this positioning brings in a dimension of power distribution. It is in this context that, since the early eighties, head of department posts were introduced in schools, unlike before, where there used to be only a principal and one deputy principal. Sisman (2004) laments the legal power and authority accorded to principals – the most authoritative persons at the school – to be insufficient. This scholar does not contend that the principal has enough legal authority and back-up to perform both managerial duties and instructional leadership (Le Fevre & Robinson, 2014).

Recent studies have seen scholars such as Spillane (2006a) agitating more on the fact that leadership not only resides with the school principal, but should encompass multiple stakeholders. Such theory is aptly referred to as distributive leadership, which

according to Gronn (2002), is a characteristic of a network of individual or a group where expertise is pooled.

Hence several writers suggested the term “shared instructional leadership” (Southwood, 2002; Day, Harris & Hadfield, 2001; Lambert, 2002; Barth, 2001; Printy & Marks, 2004; Jackson, 2000). On the other hand, other scholars like Elmore (2000), Rice (2010) and DuFour (2002) argue that writings on instructional leadership reflect behaviours adopted by principals who battle to organise activities that are centred persistently on instructional delivery across all angles. While Terosky’ (2014) contends that although many studies exist on instructional leadership, and the attention it has drawn, questions still remain on how the concept is defined, implemented and valued.

Many researchers agree that instructional leadership and its definition are still poor and that the manner in which it should be enacted appears to be too broad. Leithwood *et al.* (2006a), Knap, Copland and Talbert (2003) and Townsend and Macbeath (2012) are sceptical that the concept mainly focuses on transactional leadership practices and surface level slogan. Terosky’ (2014) points out that there has been much agitation on instructional leadership recently where he argues that the greater part of a principal’s day includes managerial functions such as school safety or facilities management, a sizable amount of paper work meant for the authorities and many other services that have nothing to do with instruction. This implies that effective implementation of instructional leadership at many schools takes a back seat to other managerial tasks (Jenkins, 2009; Knapp *et al.*, 2003; Hong, Klasik & Loeb, 2009).

More studies by Hoy, Hoy and Hoy (2003), and Sisman (2002) maintain that the chief objective of educational institutions is teaching, which manifests in other secondary activities and objectives. The role of the principal at a school has always been central to the school’s success. For more than three decades, the instructional leadership as a concept has been under review; hence, many scholars have tried to define it in ever so many ways.

One of the most comprehensive definitions is by Fullan (1991:142), who defines leadership and management as an active, collaborative form of leadership where the principal works with teachers to shape the school as a workplace in relation to shared

goals, teachers collaboration, teacher learning opportunities, teacher certainty, teacher commitment, and student learning.

Many scholars concur that instructional leadership cannot be defined as one definition (Flath, 1989). I will personally argue that instructional leadership also depends on the culture and the context of the learning institution. This is backed by Hallinger (2005:340), in his investigation of instructional leadership when he emphasises that instructional leaders were viewed as 'builders of culture'. Furthermore, Hallinger and Murphy's (1985) model on instructional leadership is preferred in most empirical studies, conceptualizes instructional leadership to be a manifestation of three constructs which explain the school's mission, promotion of a positive school learning environment and management of the instructional leadership programme (Hallinger, 2001, 2003; Hallinger & Murphy, 1985).

Effective instructional leaders do not focus and concentrate only on leading schools, but also on management, and in particular, instructional leadership. Barth (1980; 1986), in his analysis of the every-day role of heading a school, wonders about the reasons such a burden is usually placed on a single person. Barth (1990; 2001), a former principal, concludes that principals who execute the practice of instructional leadership successfully are those who were able to motivated teachers successfully to transform and change their schools into learning institutions as opposed to just a workplace. Numerous scholars maintain that the classroom has always been considered to be the teachers' private spaces where principals are generally not welcome. Their argument is that principals are less experienced than the teachers they have to supervise and lack expertise in the subject areas (Bossert, Drywer, Rowan & Lee, 1982; Cuban, 1988; Barth, 1980; 1986; 1990; Lambert, 1998).

A study by the New Leaders for New Schools (NLNS, 2009:9) acknowledges this and believes that:

Highly effective principals understand this trajectory and constantly diagnose their schools' practices against it. They have a clear picture of their current state, future goals, and the path in between. Principals use this information to identify the few, focused, and highest impact actions they can take to move their schools into the next stage and achieve breakthrough outcomes for children. They recognise that

key dimensions of leadership in an early turnaround situation are different than in a high successful, well-functioning school.

Limitations of the study on instructional leadership have been advanced by critics of this concept. It is a fact that schools are different in terms of resources, location, needs, and culture. Therefore, the kind of leadership required to transform such learning sites is also different and unique to a particular school. Arguments advanced by critiques of instructional leadership revolve around much time spent on 'other duties' than the core business of a school as outlined here earlier, being successful instructional leadership and learner attainment.

1.3 PROBLEM STATEMENT

The challenges facing South African schools and the roles principals can play have been documented locally and beyond (Jita & Mokhele, 2012). Consequently, literature has been compiled to offer remedies to some of the ills of our schools. Regrettably, not much change has been achieved, and in few instances, such change is not sustainable. This has brought into question the leadership of schools as the epicentre of schools' success.

According to Spillane (2005a), leadership is made up of multi-connected and massive tasks; so much so, that it is impossible to generate successful results unless it is distributed equitably among instructional leaders. He further argues that there are challenges with regard to comparing leadership with actions of leaders, based on the following reasons. Firstly, leadership practice involves multiple leaders, including those that do not possess formal leadership positions. Secondly, the practice of leadership does not involve "follow the leader" type of thinking, but it considers followers to be a crucial part of leadership practice. Thirdly, the interactions among individuals are important in leadership practice as opposed to the actions of individuals (Spillane, 2005a).

Many scholars tend to focus the role of school leadership on the principals; however, recent studies have acknowledged that complex organisations such as schools devolve leadership to include everybody, whether formally or informally appointed. There is no longer the notion that leadership is carried out by an individual (Spillane *et*

al., 2001; Spillane, Halverson & Diamond, 2004; Lee, Hallinger & Walker, 2012). Furthermore, Gedik and Bellibas (2015:102) highlight two aspects of school leadership, namely that today's leaders of schools are also responsible for instructional quality at their schools, and that leadership is not accepted as mere actions of formal leaders only, but it involves and integrates everybody.

This study seeks to explore and investigate how principals of selected schools balance their roles with instructional leadership. The investigation is also expected to provide insights into how principals juggle between expectations, and the ability to carry out their roles in the context of their different school culture, size and demographics.

1.4 RESEARCH QUESTIONS

The following questions were formulated to guide this study:

Key Question

How do principals go about carrying out their dual mandate as instructional leaders and managers at South African schools?

To answer this major research question, the following sub-questions will be explored:

- 1.4.1 What are the policies that inform the work of school principals at South African schools and how do principals make sense of these policy guidelines in their day-to-day work?
- 1.4.2 What structures and resources do school principals rely on to carry out their dual mandate of management and instructional leadership at schools?
- 1.4.3 How do principals go about their day-to-day practices of leadership and management of schools and how is the balance achieved, if at all?
- 1.4.4 How can one explain the success of some principals with regard to the challenge of balancing management and instructional leadership at their schools?

1.5 AIMS AND OBJECTIVES

It is my wish that every school principal will begin to reflect on their practices as leaders, managers and, above all, as instructional leaders. Since management encompasses many dimensions, it is imperative that alternative management styles be explored, such as shared instructional leadership and distributed leadership. For this reason, the present study sought to explore the dual mandate of school principals as instructional leaders and managers in schools. This was shaped by the following objectives:

- 1.5.1 Establish if there are structures and resources in schools to assist the principals in carrying out their dual mandate of managing and leading instruction.
- 1.5.2 Find out strategies that principals employ in their daily practice as leaders and managers of schools.
- 1.5.3 Explain how principals are able to achieve a balance, if at all, in the course of doing their work.
- 1.5.4 Illuminate the success of some principals in balancing management and instructional leadership at their schools.

1.6 PURPOSE AND SIGNIFICANCE OF THE STUDY

This study is significant in a number of ways. Firstly, the study is expected to highlight the plight of principals and make a valuable contribution to scholarship about the principals' challenges and opportunities with regard to management and instructional leadership. Quite often principals are found struggling on in silence and on their own. This is a result of lack of training and support for principals, especially the newly appointed. They have to navigate their own way and establish themselves at their respective schools.

Secondly, the investigation also hopes to uncover more ideas that could assist principals in their challenging roles as leaders, managers and subject teachers, and recommend suggestions for professional development and support. Thirdly, on a personal level, this research will help me as a principal to understand and share with my colleagues the value and importance of balancing management and instructional leadership.

This study supports current strides in school leadership development aimed at engagement of ethics and a reflective practice, especially in the appointments to the post of school principal and their preparation. This research advances and supports preparation, leadership theory, and practices in education (Joseph & Fiore, 2013). As a seasoned principal myself, a post I have held for 24 years, I have always had a passion for leadership development and management issues.

Initially, most principals perceive school management in a general context. According to Southworth (2002), school leadership is considered to be headship and such ideas constrain leadership to one person and implies lone leadership. He goes further to point out that beliefs in the one powerful leader are being challenged, and more emphasis is placed on ideas such as leadership teams, shared leadership, and distributed leadership (Southworth, 2002).

Studies have shown that while a lot of research has been done on instructional leadership, only a few empirical studies focused on the link between distributed leadership and student learning (Printy, 2008). In her investigation, Printy (2008) recommends strong transformational leadership from the principal in order to support and encourage teachers. Only when one is appointed into the post, a principal realises that this management is in fact diverse, and each part carries its own responsibilities and demands.

Principals then have to devise strategies on how to ensure that they cover all bases of their work. Hence, it is critically important that there must be a balance, so that no part of management suffers at the expense of the other. Since curriculum delivery is the core business of every school, it is incumbent upon every school principal to lead in all fronts, with special emphasis on instructional leadership. It is in this spirit that I felt challenged to engage in a study that will benefit not only myself, but also the entire corps of principals in South Africa and worldwide. Through this study, I look forward to engaging principals all over the country to reflect on the leadership and management in their schools.

1.7 THEORETICAL FRAMEWORK

This study is anchored on distributed leadership with instructional leadership and management as pillars. In line with Yukl's (2002) definition of leadership above, Spillane (2005) defines leadership as inclusive of all activities and tasks related to the key functions of the organisation. These functions are performed by members of the organisation to incite motivation, knowledge, and influence practices. This assertion by Spillane (2005) highlights three key features that form the basis of instructional leadership. They include firstly, 'the idea that leadership excludes influences not tied to the core technology of schooling'. Secondly, evidence of influence by individuals is not a requirement. Thirdly, the idea that attempts to influence others not only focuses on their practices, but may also include an influence on their motivation, knowledge and affects.

Most literature portray school principals as the epicentre of school leadership. Spillane, *et al.* (2003:535) agree that by focusing on and assessing how effective school principals are, the literature on leadership strengthened the notion that the principal is synonymous to school leadership. Furthermore, these authors reveal that cognitive studies of leadership perpetuate the belief tradition that leadership is seen in terms of individuals. This is supported by Heller and Firestone (1995), who believe that such traditional thoughts have a tendency to ignore other structures of leadership within the schools. It therefore dispels the myth that leadership is centred on an individual.

School leadership can therefore be defined according to Spillane *et al.* (2003) as the identification, acquisition, allocation, coordination and use of the social, material, and cultural resources necessary to establish conditions for the possibility of innovation in teaching and learning. Research by Spillane *et al.* (2004) has proven that school leadership recognises the importance of many role players at a school, who perform the same and different functions in order to achieve set goals of the school. The school context places principals in a difficult position as they battle to implement distributed leadership equally due to different demands of different subjects according to their importance (Spillane *et al.*, 2003).

According to Southworth (2002), instructional leadership practice has mostly been attributed to superintendents, principals and 'other formal leaders at schools. However,

more emphasis is on the heads of the institutions. In his investigation on instructional leadership, Neumerski (2012) admits that since all responsibility regarding instructional leadership is placed on principals, not much in literature actually talks to 'activities of teachers'. Hence, this investigation seeks to explore instructional leadership and distributed leadership by principals and how it will affect activities of the teachers. Spillane (2005b) argues that principals or any other leaders in schools do not necessarily guide schools single-handedly to 'greatness'. He asserts that it takes a number of people with different tools and structures. Furthermore, he insists that leadership is not only vested in what each individual does, but mostly on how and why each does it.

Spillane (2005b) accepts that distributed leadership is a considerably new concept, which has attracted a lot of attention among scholars in the United States of America. He goes on to indicate that this concept has been used collaboratively with 'democratic leadership', 'shared leadership', and 'team leadership'. More often, these terms are used to define the leadership styles of school leaders, where such leadership involves others within an organisation. Furthermore, distributed leadership perspective allows for shared leadership, depending on the situation, while on the other hand distributed leadership perspective supports the kind of leadership that can be either democratic or autocratic. More on theoretical framework will be covered in Chapter 2.

1.7.1 Research methodology

This investigation was fundamentally rooted in a qualitative research methodology, with a case study as the research design (Yin, 2008). According to Denzin and Lincoln (2003), the qualitative approach empowers researchers to record verbal interactions, analyse and interpret participants' inputs. The research explored qualitative and empirical methods with interviews and job shadowing, i.e. observing or shadowing principals in their daily practice.

Data in the form of observations, documents, and audio and visual recordings were collected during interactions throughout the day and at the end of the visit. Five principals drawn from a selection of top-performing schools were identified, irrespective of gender. The researcher hoped to diversify the pool by choosing principals from at least two provinces in South Africa (i.e. Gauteng and the Free State).

Data collected were transcribed into text, which could be categorised into different themes that could explain the results of the study. Themes were then identified in order to answer the research questions. Other data collected from field notes and supplementary documents were included in the analysis.

Each principal was shadowed over two full days, where observations were done and semi-structured interviews took place, with document analysis using the three data collection strategies to triangulate and strengthen the validity and reliability of data (Jita & Mokhele, 2013). Data with similar approaches to leadership were grouped together (Spillane & Hunt, 2010). The study was guided by the interpretive approach paradigm.

1.8 DELIMITATIONS

The data collection through observation and shadowing principals in their own schools resulted in authentic and immediate responses. The focus was on the six carefully identified participant principals. The six selected schools were derived from two provinces adjacent to each other, that is, Gauteng and the Free State (in South Africa). Collected data in the form of audio, notes from interviews, documents, and conversations were transcribed into narratives and analysed carefully in order to obtain accurate information and relevant facts.

1.9 LIMITATIONS

This study was based on the six top-performing schools from two provinces. Only specifically and carefully identified principals took part. It is acknowledged that South Africa has a very sad history of imbalances and segregation, therefore it was imperative to tend to focus more on schools that were previously disadvantaged. This investigation did not involve teachers and learners.

Honesty and openness of respondents are key to the success of this study. I deemed it necessary to establish a harmonious relationship and camaraderie with all participants before I could even start collecting data. This ensured that they could freely talk about anything requested from them, although the culture of schools could

have been a concern. It was envisaged that such participation would lead to greater effectiveness, ownership, efficiency and transparency.

My interest in the study could pose a challenge of biasness, since I have disclosed that I am a practising principal. However, this was carefully scrutinised so that it did not compromise the results of this investigation. Data collection approaches and methods were thoroughly executed in order to clarify any ambiguity in interpretations.

This was a qualitative case study investigation, and therefore findings generated were not generalised, since they are unique to the selected participants and their contextual settings.

1.10 DEFINITION OF KEY TERMS

This study is centred on three key concepts, leadership, instructional leadership and distributed leadership.

Leadership: Is not limited to the performance and functionality of an individual. Rather, it is entrenched in the dynamic and interactive relationships among various leaders (and followers), as well as the different contexts within which they perform their tasks (Spillane, Halverson & Diamond, 2001). On the other hand, Yukl (2002) asserts that leadership is “a social influence process whereby intentional influence is exerted by one person (or group) over other people to structure activities and relationships in a group or organisation” (Yukl, 2002:3).

Instructional leadership: According to Louis *et al.* (2010), there are two levels at which instructional leadership occur at school: the actions of the principal to improve instruction – where ‘instructional climate’ and ‘instructional action’ take centre stage. They argue that instructional climate is about (creating) a ‘culture of professional growth and student learning’, while instructional action concentrates on the actions applied to achieve set goals.

Distributed leadership, according to Spillane *et al.* (2003), is a framework of leadership where several individuals’ practices are brought together to mobilise and guide the school staff towards innovative and productive instruction.

Management: Many scholars define management in different ways and more often in comparison to leadership. Earley and Weindling (2004:5) assert that management of a school is about enacting the policies and ensuring effective and efficient running of all school activities. Furthermore, Davies (2005:2) highlights a distinction between leadership and management, where management is focused on planning in order to effect efficiency at the school, while leadership is concerned with provision of direction, while inspiring others to work together to reach set goals.

1.11 CHAPTER OUTLINE

Chapter 1: Orientation and background to the study

In this chapter I introduce the study and provide the motivation behind it by highlighting its significance from both an individual perspective and the professional level. The context of the investigation is clearly spelt out in line with existing literature on the complexity of managing in the middle, and attempting to balance all management and instructional leadership in the school.

Chapter 2: Literature review

The literature review focuses on constructs that relate to this study, including the theoretical framework on which the study is anchored. This chapter contains a range of literature relevant to the focus of this study, also reflecting on the critical theory, distributed leadership, and instructional leadership as the underlying theoretical framework for this investigation.

Chapter 3: Research methodology

The chapter involves the outline of the research design, research methodology and research method used to investigate the research problem outlined above. The process involved data gathering and instruments used, analysis of data and the strategies used to interpret it, as well as the ethical considerations.

Chapter 4: Data presentation, analysis and discussion

This chapter discussed all the data collected from the qualitative engagements with the principals. Data collected through interviews were codified into narratives. Each

case was discussed according to themes that emerged. Relevant instruments were used to analyse all the information gathered.

Chapter 5: Cross case analysis: The common and the diverse.

A detailed discussion of this study is presented and the main findings revealed. I thoroughly interrogated data, comparing each and every participant narratives through the cross case analysis. These were then analysed and discussed in order to provide more clarity.

Chapter 6: Findings, recommendations and conclusion.

The chapter provides a synopsis of the relevant findings organised according to themes in line with my research questions. An overview is also given of the gaps identified if any, as well as limitations. Recommendations are made where appropriate, and in closing, the general conclusions informed by the findings from the research are presented.

1.12 CHAPTER SUMMARY

This chapter provided the introduction, orientation and the background of the investigation. In order to introduce the study, the state of leadership, management and instruction by school principals in South Africa was outlined first. This was done so as to reflect on which schools are well led and managed, as well as the huge differences between schools in terms of functionality, performance and culture. The significance of the study to the teaching profession and the principals in particular. Literature supporting earlier studies on the topic has also been reviewed. The chapter outlines the research problem, namely to explore and investigate how principals of selected schools balance their management roles with instructional leadership. The chapter further provides insights on how principals juggle expectations, and their ability to carry out several roles in the context of their different schools' culture, size and demographics.

This chapter also outlines and reflects on the questions and the objectives that guided this study, as well as the research methodology used. In conclusion, the possible limitations and delimitations of this investigation are highlighted. The feasibility of the

study and what it is informed by, are presented in paragraph 1.9 above. The next chapter presents the theoretical framework, which is anchored in leadership, instructional leadership, and distributed leadership as the key pillars and a lens through which this study was viewed.

CHAPTER 2:

LITERATURE REVIEW

2.1 INTRODUCTION

School leadership is mostly and globally acknowledged to be the lynchpin for school success (Spillane, 2017:7), therefore school principalship has been and will always be the subject of contention for many people. This also applies to scholars and researchers who have been grappling with this subject for decades now. Central to this is the fact that principals have a huge responsibility to create schools where learners will have equal opportunities to learn and develop their talents in order to become beneficial to society. Teachers also need progressive schools where they will be able to share their expertise, knowledge and experiences, while at the same time experiencing growth in their careers.

Parents entrust their children to schools under the principals' leadership so that they can become responsible adults and productive citizens. The fact that parents put their trust in the teachers and principals makes it mandatory that their job becomes more of an obligation than just work. Principals now have to transform from traditional command and control with dictatorial tendencies, to collective and inclusive leadership sharing approaches, because such leadership has proved to be unsuccessful (Harris & Day, 2003:96; Grant & Singh, 2009:289; Spillane, 2009:70). Leadership in present times is mostly focused on people cooperating with one another and working together as a team, not being afraid to take risks (Oduro, 2004:42).

Brandon *et al.* (2018:1) assert that we live in times where school principals worldwide are challenged to provide strong and effective school leadership that promotes high standards of teaching and learning (Pollock, Wang & Heuseman, 2015; Schleicher, 2015; Zepeda & Lanue, 2017). These scholars, supported by many others, believe that school principals' work is continuously spiralling, becoming complex and too demanding at the same time (Pollock *et al.*, 2015). According to Mestry (1999), expectations from the principals' actions have changed and continue to evolve.

These unprecedented changes present arguments centred on the demands which are often controversial and confusing about the role of a principal. This is supported by

Blase, Blase and Phillips (2010), where they maintain that the addition and piling up of more responsibilities and tasks have further compounded the already demanding roles they currently have. This chapter provides a literature review, inspired by the research questions, with emphasis on school leadership, management as well as distributed and instructional leadership. I present arguments from scholars all over the world including South Africa, looking at successful practices that enable the top schools to be where they are, especially when it comes to how their principals are able to execute their roles and achieve a balance in the process of carrying out their mandate.

2.2 LEADERSHIP

According to Uhl-Bien (2006), leadership is perceived as a collective social process resulting from interactions among various participants. Therefore, effective leadership by principals emphasises exemplary leadership, assisting and capacitating teachers on their roles so that they become motivated and able to execute their tasks (DuFour & Marzano, 2011).

On the other hand, Spillane and Diamond (2007), assert that a notion of distributed leadership is made up of two aspects, firstly the leadership-plus aspect, which accepts and recognises the efforts of every individual who has contributed towards leadership and management activities instead of only focusing on those who occupy formal and designated leadership roles. The second one is the practice aspect, which is entrenched in the practice of management and leadership. Spillane and Diamond (2007:7) regard it as “a product of interactions of school leaders, followers, and some aspects of their situation”. Hence, according to Bolden (2011), such issues of leadership lay a foundation towards the study of the daily practices of leaders as they engage in leadership and management of their organisations. Bolden (2011) however laments the degree to which the focus tends to be on structures, functions and their roles. In our efforts to forge understanding of leadership, Spillane (2017) argues that we need to focus on how different role players jointly embrace and execute their roles, and how the relationships among them are.

As alluded to in the previous chapter, numerous studies have focused on the school principals' role in improving teaching and learning. However, there has also been substantial research, which indicates that organisational leadership, particularly in big

and complex institutions like schools, is not dependent and not performed by a single person. Rather, such leadership functions are distributed amongst other members of the organisation (Lee *et al.*, 2012; Spillane *et al.*, 2001; 2004). Spillane *et al.* (2004:10) assert that there are two important areas of leadership that impact on the effectiveness of the school, namely that school principals should take responsibility for the quality of teaching and learning taking place at their schools, and that leadership is not only vested in formal leaders. Instead, activities of those occupying formal leadership positions, together with those without positions and the interaction among them and their situations should be shared.

A number of scholars initially placed school leadership on one individual, which is the principal. However, findings from other scholars approached leadership as a collective of instructional leadership activities undertaken by numerous leaders, and these include formal and informal leaders, as well as the relationships among them. (Halverson *et al.*, 2014; Kelley & Halverson, 2012). Literature on school types emphasises the difference between primary and secondary schools. Louis *et al.*, (2010), argue that the roles of the school principal in improving teaching are divided into two types, 'Instructional Climate' and 'Instructional Action'. They explain the teaching environment as an initiative to establish and entrench a process of professional development and student learning, while instructional practice is about activities performed in order to realise the tone that was set.

Leithwood (1994), and Ogawa and Bossert (1995) are adamant about a theoretical leadership framework, which they used to explore the effects of leadership. In their study, these scholars focused on four hypotheses which they believe can impact and affect an organisation. These include the aims and objectives, structural orientation and networks, as well as the culture of the organisation. These scholars agree that the image they painted is that leadership not only influences and affects individuals, but the entire organisational system in which individuals such as teachers, learners, parents, administration staff, and general assistants operate or function.

Many other scholars have explored and continue to investigate the subject of leadership as a distributed function, not necessarily allocating it to an individual, and expecting it to be exercised through the behaviour of the principal. Scholars of educational leadership have mostly focused on leader practices, and very little scrutiny

has been associated with internal processes and trust among those involved in leadership. The school principals play a central role as mediators of trust and role models and agents of high morals.

It has been observed that not much has happened after Leithwood's (1992) study, wherein he recommends that more studies are needed to understand the attitudes, values, beliefs, traits, and disposition of leaders, with a particular focus on school principals. Among the scholars who tried to respond to this call is Gimbel (2003), who found that principals viewed trust as a one-on-one relationship they had with their staff. He goes further to say that trust among them involves the principals showing dependability, consistent spirit, and eagerness to follow-through. This finding is limited in that it is short of explaining in detail how the principals inculcate trust in their relationships with the stakeholders.

In the context of this study, trust is a moral resource, or an important type of social capital that exposes one to vulnerability by others. According to Tschannen-Moran and Gareiss (2004), trust is defined as "one's willingness to be vulnerable to another based on the confidence that the other is benevolent, honest, open, reliable and competent" (Moran, 2004:17). The establishment of professional learning communities brought about changes in the kind of trust and the functioning of principals. There has been a shift from principals being charged with the responsibility of being accountable to that of being the nucleus that synthesises all activities such as, providing information and strengthening healthy relationships, therefore mediating goals to be achieved and decisions to be taken.

In their study, Noonan, Walker and Kutsyumba (2008:17), conclude that trust manifests in five "facets", which include: (1) benevolence – since school principals deal with people's feeling of vulnerability, they need to show caring about those they interact with on a daily basis; (2) Honesty – which goes together with integrity, was identified as critical to the role of the principal at a school. Here they emphasise openness in terms of communication with their staff, governing body and parents; (3) Reliability – is one of the elements of trust and manifest in the principal being the leader followers can rely on; (4) Predictability – principals need to be predictable because followers need to know the type of leader they have; (5) Competence – the principals' potential to execute their tasks, and is the underlying theme of organisational learning based on

trust, because collaboration among stakeholders is anchored on the community rather than an individual.

Leadership has been given so many labels, which in fact denote the different styles and approaches to achieving organisational goals. Such labels include adjectives like democratic, transformational, moral, strategic, participative, and instructional leadership. In fact, instructional leadership is about enhancing classroom teaching by teachers, while transformational leadership combines all activities within the school and how these can be changed (Leithwood, Louis, Anderson & Wahlstrom, 2004:7). The term 'instructional leader' is not difficult to explain, because it actually highlights the key functions and the role played by the principal as those of spearheading instructional leadership by ensuring that teaching and learning are at the centre of all activities of the leader. It therefore focuses on ensuring that there is an improvement in classroom practices of teachers.

One very interesting study by Spillane (2019) argues that, out of a myriad of ways of organising school leadership tasks, the most effective approach is to view it in terms of three interrelated parts: fire-fighting, sustaining order, effective organisational protocols, and introducing necessary changes. Furthermore, according to Spillane (2019), putting out fires includes spontaneous occurrences that continuously arise and which demand the attention, time and energy of the principals. These include attending to health issues of students, leaking roof in the school hall, or the unexpected change in weather conditions that warrants that the school be dismissed earlier than usual. There is no doubt therefore that fire-fighting remains one of those tasks that school leaders will always encounter.

On the other hand, organisational maintenance responds to the managerial demands placed on school leaders, and they include attending leadership meetings, doing class visits, taking instructional rounds, and participating in the professional learning communities among other things (Supovitz, D'Auria & Spillane, 2019:7). In the same vein, school improvement, as a core objective of educational leadership calls on leaders to constantly be innovative in their operations, where they are called upon to continually introduce and initiate reforms in their schools. Such reforms are mostly aimed at bettering the scores of learners and improving their educational experiences.

2.3 LEADERSHIP AND MANAGEMENT

Many scholars have conflicting arguments over the overlapping nature of management and leadership. However, these scholars agree that the two are not synonymous (Bass & Riggio, 2010). Accordingly, Northouse (2007) notes that though leaders and managers share certain similarities, like their influence on others to achieve specific goals, there are very glaring differences. Northouse's (2007) definition of management is about a system where resources are meaningfully deployed to support and ensure that organisational goals are reached. He goes further to explain leadership as a complex, multidimensional phenomenon, which, according to DePree (1989), is defined as a behaviour, a style, a skill, a process, a responsibility, an experience, a function of management, a position of authority, an influencing relationship, a characteristic, and an ability (Northouse, 2007).

Most literature supports the notion that managers seek to do everything right, while on the other hand, leaders seek to do the right things. This is a very conservative way of presenting the difference between the two. However, a successful manager must have leadership as one of the key assets. The main purpose of management is maximising organisational output by the effective use of administrative systems. This happens through execution of the following basic functions: organising, planning, staffing, control, and directing. On the other hand, leadership is about exerting influence over other people such that the organisational goals are achieved (Northouse, 2007).

Various researchers present different qualities of leaders. Kotter (1990) believes leaders provide motivation to followers with the aim of instilling passion to achieve the set goals, both short- and long-term, being prepared to take calculated risks, as well as challenge the existing standards. However, Bennis and Nanus (1985) insist that a leader seeks to improve followers' conditions of service so that they can follow the leader out of their own volition, and a transformational leadership style is practised to lead the subordinates (Bass, 1990). According to Capowski (1994), the school leader should be tough, have integrity and be decisive and trustworthy. Furthermore, a school leader's vision should be supported by commitment and selflessness, communication and consistent visibility. A common feature among many researchers is that they agree on Blasé and Blasé's (1998:119) assertion that the prime focus of any educational

leader should be to ensure that learning takes place and that learners can achieve the expected outcomes. (William, 2016; Zepeda & Lanoue, 2017).

According to Nortinhouse (2007), leadership and management involve a lot of interrelated activities that are more often similar due to their influence on people by virtue of the powers they have. However, there are also differences between the two.

2.4 MANAGEMENT

The Top Ten Qualities of an Excellent Manager as outlined in the *Management & Leadership Handbook* (Fasset, 2012:45). An exceptional manager effectively utilises all the talent and resources at his disposal to enable others to reach higher levels of excellence. Such managers instigate a world of endless possibilities among the people they lead. Critical qualities possessed by esteemed managers include high levels of creativeness and commitment, being versatile and approachable, and highly disciplined (Fasset, 2012:45).

Creative managers capture the interest of the people and drive their projects towards successful completion. Being creative is like a glue that sticks different pieces together, making them one solid unit, while also providing intrinsic motivation and hunger to succeed. Even though managers often operate within contexts and structural settings where there are parameters and limitations, good managers understand clearly how to find their way, and do not allow the structure to disturb and derail their projects. Such managers clearly know and understand all structural systems, which enable them to direct those they lead to be effective, while aligning with the confines of the given directives. On the other hand, intuition is the ability to know by following all reasonable procedures and processes.

Insightful managers mostly have the potential to detect how their charges think and feel, and are in a position to address their concerns adequately and with understanding. Hence a person with a strong intuition very often develops into a strong manager. Thorough knowledge base is a critical requirement that should be integrated into everything that is done by the manager, so as to demonstrate transparency and focus on the developmental needs of the employees. Excellent managers do not pay too much and unnecessary attention on the knowledge base, even though they rely

very much on it, but dedicate most of their time to employees. The manager commits to the successful completion of the projects and dedicates adequate time to the team members. (Fasset, 2012:45). Such a manager assumes the role of a vanguard for the vision of a collective, and ensures that the team pulls together in order to achieve the results. The commitment and dedication of a manager propels the team to move, even when times are tough. Therefore employees appreciate and respect managers who do not rely on their authority to lead them. Managers who are respectful and human towards their employees are an inspiration and are generously rewarded with their loyalty. The best leaders are those who are not afraid to be themselves (Fasset, 2012:45).

Good managers exercise flexibility, where necessary, and are versatile. These qualities enable them to be non-reactive and are valuable assets in the life of a manager. Versatility implies an openness; this openness allows the leader to quickly “change on a dime” when necessary (Fasset, 2012:45). Flexibility and versatility are the pathways to speedy responsiveness. A stellar manager not only produces outstanding results but s/he has fun in the process. Lightness does not impede results, but rather helps to move the team forward.

Lightness complements the seriousness of the task as well as the resolve of the team, therefore contributing to strong team results and retention. Also, discipline is the ability to choose and live from what one pays attention to. Discipline as self-mastery can be exhilarating. One role models the ability to live from one’s intention consistently, and one will role model an important leadership quality (Fasset, 2012:45). Excellent managers see the bigger picture simultaneously with managing the details. Small actions lead to the bigger picture. Contributions by each member of the team significantly make a huge impact on the collective achievement of goals.

The table below captures the main differences between Management and Leadership.

Table 2.1: Leadership and management (Management and Leadership Handbook [Fasset, 2012:10])

Transactional (Management related)		Transformational (Leadership related)
Models	• Rational, internal process, structure, power, knowledge	• Human relations, open systems, symbolic
Approaches and theories	• Trait approach • Skills approach • Style approach • Situational approach • Contingency theory • Path-goal theory • Leader-member exchange theory • Team leadership • Four-drive theory	• Transformational leadership • Team leadership • Shared leadership • Psychodynamic approach • Ethical leadership • Woman and leadership • Four drive theory
Role of manager and leader	• Planner • Organiser • Controller • Monitor • Coordinator • Producer • Director	• Visionary • Innovator • Influencer • Mentor • Facilitator • Coach and guide • Moral, ethical leader
Objective	• A process that reduces chaos and produces order and stability • Accomplishes mission • Defines the organisation through actions and deeds	• A process that encourages chaos (challenges status quo) and produces change and movement • Creates a vision • Gives the organisation meaning while defining and nurturing its core values
Overlap of management and leadership	• Gets things done, i.e. accomplishes goals through people – influences • Plans, organizes, builds systems to encourage successful performance • Integrity, professionalism, and innovation reflect values of the organisation and influence actions	• Gets things done, i.e. accomplishes goals through people – influences • Plans, organises, builds systems to encourage successful performance • Integrity, professionalism, and innovation reflect values of the organisation and influence actions
Culture	• Fosters closed culture, a mechanistic structure, rigid systems and procedures – a defence-like strategy. • Focused on survival ability	• Fosters an open culture, an organic structure with flexible systems and procedures – a protector-like strategy. • Focused on sustainability

2.5 LEADERSHIP AS A COMPETENCE

According to Bennis (1984), there are four competencies that can be attributed to leaders: management of meaning, management of attention, trust, and self. Educational leaders need to understand the meaning of schooling, clearly showing the purpose of school in order to manage effectively. In managing attention, the educational leader has to channel all the energies of teachers and support staff in the school in such a way that it is used to achieve the school's goals. Management of trust refers to the behaviour of educational leaders which impacts on the followers and their perceptions about their leaders. Managing self means the leaders must know themselves, their strengths, weaknesses, and passions (Bennis, 1984).

According to Katewa and Heystek (2019), self-management is the basis for all leadership. These scholars go further to argue that self-leadership is focused on the actions used by people and thoughts for self-influence and motivation. Katewa and Heystek (2019) further assert that people look within themselves for the source of motivation and control. This assertion is influenced by several other scholars including Neck & Houghton (2006), and Neck and Manz (2010), who describe self-leadership as a way of driving oneself, to set individual purpose and motivation required to enhance performance. Their ideas are supported by several scholars (Furtner, Rauthmann & Sachse, 2015) who believe that self-leadership "is a separate and identifiable concept and practice which can be distinguished from other leadership approaches" (Katewa & Heystek, 2019:74).

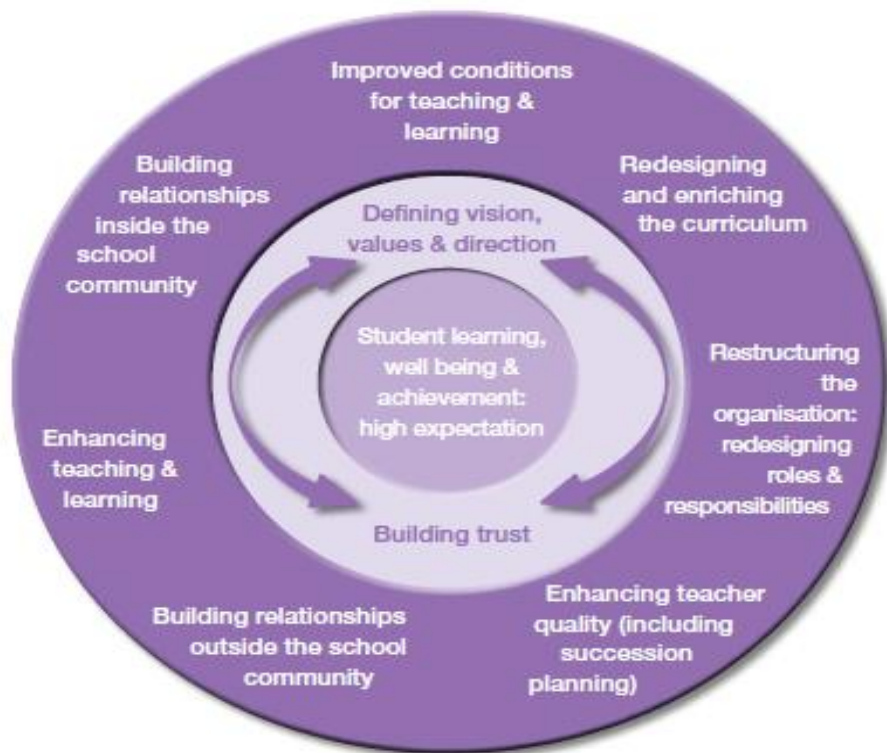


Figure 2.1: Successful leadership dimensions (Day et al., 2010:16)

Successful leaders develop and define the vision, values and objectives, and give direction to the organisation. Figure 2.1 shows the ripple effect of a well-crafted vision which gives direction to all stakeholders in the school. This also develops trust and encourages commitment amongst all those involved, resulting in improved learning outcomes, as a result of high expectations set. According to Day et al. (2010), effective head teachers in the US display a clear vision that is supported by strong values at their schools. This inspires everyone to pull in the same direction and improve their performance, both as individuals and as part of a collective. These leaders ensure that their goals are shared and understood widely in their schools. The head teachers act as a springboard where all new developments, legislations and other progressive initiatives are tested, thus also improving conditions for teaching and learning (Day et al. 2010).

The heads of institutions see the value of transforming the environment within which teachers operated, including classrooms where teaching and learning take place. This is to effect maximum performance from the learners. They also seek to improve the physical environment of their schools. They believe this enhances optimal performance among both learners and teachers. These scholars (Day et al., 2010)

furthermore found that head teachers find it prudent to embark on the transformation of organisational structures where they fine-tune their roles and promote distributed leadership in such a way that it covered their entire staff. They agree that this promotes ownership, resulting in more students improving and achieving.

There are consistent efforts to make participation in decision-making as broad as possible at all levels. Sustained initiatives to improve teaching and learning are sourced, while ensuring that the environment where teachers operate is conducive and attractive to them, which enable them to try new methods and approaches in their teaching. This in turn results in improved student outcomes. Hence Botha and Triegaardt (2015) contend that distributed leadership is more likely to flourish in functional environments and schools.

Headteachers pay more attention to redesigning the curriculum as a way to improve student achievement. They believe academic achievement is not supposed to compete with personal and social development. However, they were convinced that the two actually complement each other. They also ensure that the curriculum is aimed at increasing opportunities for learning, while simultaneously providing ample opportunities for learning to be accessible to all learners, by emphasising the stage of development and not their learning age. They have introduced changes addressing students' self-esteem and their creativity. This also includes developing key skills while not neglecting their academic programme. They believe that students who enjoy learning become very effective in their studies.

The value and importance of extra-curricular activities can no longer be ignored. These include lunch breaks, after-school clubs and those activities happening during school holidays. These head teachers take it upon themselves to prioritise staff development in order to uplift the standards while sustaining staff motivation and improving their attrition rate. They encourage their staff to participate in the internally driven staff development programmes made available to them. This results in their staff improving their qualifications and competitiveness in the different spheres of interest and expertise.

Many school leaders strategically embark on planned succession and meaningful but targeted recruitment of staff, while promoting healthy relationships within their school

communities. They introduce mechanisms aimed at sustaining positive relationships among all their staff members, which also develops a sense of value and pride in them. This is evident in the improvement of their professional and personal well-being. There is a relationship of mutual trust and respect among head teachers and senior leadership teams. They also strengthen relations between the school and the external stakeholders. Improvement of the schools' reputation also adds value and brings in a lot of benefit to the schools.

All the competencies outlined above are critical to the overall effectiveness of each and every school. School leaders in South Africa can benefit substantially from these modern trends, especially when one looks at the various challenges they face in their schools on daily basis.

2.6 INTERNATIONAL LITERATURE REVIEW ON SUCCESSFUL LEADERSHIP

While various scholars (NLNS, 2009) are in agreement over the importance and critical function of school principals, and their influence on student achievement, they differ considerably on the way the outcomes of leadership have been analysed, based on the variables and designs employed to investigate the nature and importance of all school leadership aspects on improving student results. This is prevalent mostly in the commonly researched leadership models, which have been found to yield the best results: the 'instructional' and 'transformational' leadership (NLNS, 2009). The transformational leadership focuses more on the vision and inspiration, emphasising the establishment of structures and cultures that improve the quality of teaching and learning, giving direction, capacitating people, and re-designing the organisation. Instructional leadership, on the other hand, focuses on setting clear educational goals, planning the curriculum, evaluating teachers and their teaching. Leadership's primary focus is to promote achievable and measurable outcomes, by pressing on the value and quality of teaching and learning in the classrooms.

International scholars (NLNS, 2009:5-7) have come up with the following key themes about successful principals: (1) Longevity of dedication, commitment and individual accountability; (2) sustenance of ethical disposition, purposive and management of behaviours; focussing on instruction and development and believing in others; (3) investing in emotions and rationality; (4) always focussing on the individual and the

functional (NLNS, 2009:5-7). These themes deepen the strong belief among educational leaders that for leadership to be successful, there needs to be a mixture of cognitive and emotional understanding, aligned to high standards and clear values, careful use of key strategies, and an incredible passion for education and love for people.

These are further divided into various categories such as: (a) Passionately sustaining passion for their work, commitment, and personal accountability; (b) Espousing and pursuing moral purpose and managing conflicts and challenges; (c) Prioritising learning and development by paying attention on others, by creating opportunities for them to lead; (d) Investing in rationality and emotional wellbeing; (e) Putting more emphasis on the personal and the functional (NLNS, 2009:5-7).

In their international study of the practices of leadership in schools conducted in eight regions: Alberta (Canada), England, Ontario (Canada), New York (United States), New Zealand, The Netherlands, Singapore, and Victoria (Australia), Barber, Whelan and Clark (2010) found that principals who perform excellently do not have to work more than the prescribed school hours. Instead, such principals dedicate most of their time to working with their staff members. These principals maintain high visibility, walk along the corridors, encouraging and motivating their teachers and engaging with parents and other stakeholders and, most importantly, spending more time with their students (Barber *et al.*, 2010:7). According to Lee and Hallinger (2012), another review of leadership in various national settings that looked specifically at principals' time allocation undoubtedly found that the way principals use their time can be affected by factors in society such as the economic, sociocultural and institutional features of the particular systems in which they participate.

By using the power distance Index (PDI), which shows society's hierarchical levels, scholars established that school principals from the lower PDIs spent the greater part of their time on instructional leadership. This time was mostly spent on building strong and collegial relationships among teachers, interacting with and communicating with parents and the broader community of stakeholders (Lee & Hallinger, 2012). According to the Teaching and Learning International Survey (TALIS) conducted by the OECD where 23 countries took part, it was found that the degree of instructional leadership implementation differed from country to country based on different contexts. This

survey further found that the most successful school leaders were those who promoted greater collaboration among teachers, forged healthy interactions between students and teachers, as well as recognising teachers for their innovative initiatives (OECD, 2013).

These scholars also realised the importance of educational policy. Hence, in their earlier study, involving 14 countries of the OECD about the practices of school leaders and policies, they found the following four levers for improvement (OECD, 2008): (1) Redefining responsibilities of school leadership (accepting that being on their own does not spontaneously result into improvement, but needed support from authorities); (2) Distribution of leadership and delegation of duties equitably within and between the schools; (3) Critical value of providing initial training towards leaders, and continued capacity building; (4) Promoting the status of leadership, and making it attractive profession for career choice (Pont, Nusche & Moorman, 2008:17).

The Malaysia Education Blueprint (2013) also emphasises an outstanding principal as “one who is more focused on instructional and not administrative leadership” (MEB: E-27). However, this was difficult to achieve in Malaysia, due to the fact that the administrative leadership in such a highly centralised system is the norm. Hence the Malaysian Education Blueprint (MEB) recognises the importance of allowing schools and their leaders to be autonomous; “In future all schools will be responsible for operational decision-making in terms of budget allocation and curriculum implementation” (MEB, 2013:E 29). Even though this new system allowed school principals to exercise and drive instructional leadership, their orientation was still not changed (Hallinger and Lee (2014:6), “despite new system expectations for principals to act as instructional leaders, the predominant orientation of Thai principals remains largely unchanged”.

2.7 INSTRUCTIONAL LEADERSHIP

School principals in South Africa are confronted with challenges on daily basis; however the following two appear to be more significant. Firstly, they have to deal with a plethora of decisions every day of their school lives. Secondly, they are mandated to ensure that quality teaching is offered to learners (Mestry, 2017:258). Other scholars agree that the effective management of the instructional programme of the school is

one of the prominent aspects that can contribute to creating favourable conditions, and promote a sound culture of teaching and learning (Day & Sammons, 2016:7). There is wide consensus among scholars that the volume of the school principal's work has reached unimaginably high levels, especially in secondary schools, where they no longer have the time even to understand their role with regard to instructional leadership (Pollock et al., 2015:538).

Tshabalala (2015:60 - 62) asserts that instructional leaders need to be viewed through the four qualities they display: providers of resources, leaders of instruction, communication sources, and being highly visible. The critical and central roles of the principal have been emphasised in this study, which does not necessarily imply that they must be everywhere in the school, as alluded to earlier. Ancient scholars came up with three theories on conditions that shape the behaviour of an instructional leader: the adaptive-reactive theory, expectancy, and the role (Tonkovich, 2002: 16 – 17). These researchers proposed that the behaviour of the principals' leadership is enhanced by the thought of how people expect the leader to behave. On the other hand, principals themselves think of their role as being influenced by prescriptions like job description, day-to-day requests, and instructions and directives from their supervisors and the departments.

Louis *et al.* (2010) aver that instructional leadership takes place differently at different schools. There are two types of actions to improve teaching and learning that the principals are involved in: the "Instructional Climate" and "Instructional Action". The instructional climate, on the one hand, is based on the creation of a culture of professional growth and development and learner learning. On the other hand, instructional action is about the actions taken to achieve the set goals. It needs to be highlighted here that previous research on school leadership has mostly portrayed school leadership according to the way teachers and principals viewed it. This is supported by Jita and Mokhele (2013), where they assert that no study has made any significant efforts to measure the practices and actions of school leaders. Therefore my study focused on investigating principals' narratives on balancing leadership, management and instruction in South African schools.

These scholars furthermore indicate that subject specific instructional leadership is one area of research that has also not been explored. They argue that most of the

research in South Africa has focused on formal leaders or positional leadership, and that such leaders do not have teaching duties (Jita & Mokhele, 2013). On the other hand, these scholars concur that instructional leadership is distributed throughout the whole education chain and at schools. This means that leadership is not only provided by the leaders who occupy formal positions of leadership on what is being taught in classrooms, but it occurs systematically through different levels in the system.

According to Spillane (2001), leadership is comprised of multifaceted and complex tasks such that it cannot produce the desired successful outcomes, unless it is distributed among the instructional and administrative staff. This objective must include teachers in decision making, particularly on issues involving instruction. More and more evidence has surfaced in support of the idea that in order for instructional leadership to be effective, it has to be shared among school leaders and teachers (Hallam *et al.*, 2015; Szczesiul & Huizenga, 2014; Tschannen-Moran, 2016; William, 2016).

Furthermore, Louis and Wahlstrom (2012:25) are also in favour of the idea that practices of leaders, which are aimed at the improvement of instruction have a big impact on the working relations of teachers and indirectly affect learner achievement. "When principals and teachers share leadership, teachers' working relationships are stronger and student achievement is higher." (Louis & Wahlstrom, 2012:25-41)

There are varying thoughts and views about the actual nature of instructional leadership role of the principal. According to Mestry (2013), instructional leadership can be defined as the actions taken or delegated to others by principals in order to promote growth in students' learning. On the other hand, Gilbert (2010) asserts that the work of school principals has intensified, and over the many past years, greater focus and attention have shifted towards financial administration, much to the detriment and neglect of instructional leadership. This unfortunate shift towards managerial issues created an unhealthy gap between school principals and their staff, as well as the learners.

Hallinger (2003:332) came up with a clearly defined three-part model of instructional leadership. The first part is to define the mission of the school. This includes developing achievable goals and sharing them with all stakeholders. The second part

is to manage the instructional programme, which ideally focuses on supervising and evaluating the mediation of instructional practices of teachers. This is followed by the third part, which deals with the creation of a positive and an enabling environment, where teaching and learning can prosper, while also providing incentives, motivation and developing teachers. (Brandon *et al.*, 2018; Robinson, Lloyd & Rowe, 2008).

Furthermore, Hallinger (2005), insists that principals lament that they do not have the time and the necessary expertise to be hands-on in classroom activities like supervision of teaching and instruction. Yet, scholars such as Hoadley, Christie, Jacklin and Ward (2007) report that principals in South Africa dedicate more time and attention to administrative tasks and dealing with learner discipline. They also agree that the majority of principals' actions on instructional leadership as far as overseeing teaching and learning and supervision of teachers is still lacking.

Lack of time to support instructional leadership has also been voiced by several other scholars with regards to performing other tasks such as budgeting, attending to parents and students' concerns, compiling reports and other bureaucratic imperatives, as well as other urgent organisational functions, which quite often take priority over instructional leadership (Brandon *et al.*, 2018; Robinson *et al.*, 2008). Principals have raised these management concerns as inhibitors towards their ability to provide instructional leadership effectively due to time constraints.

2.8 THE CHANGING ROLES OF PRINCIPALS

It is quite a daunting task to define and explain the role of principals in the context of the ever-evolving policies, responsibilities, expectations, and curriculum imperatives. According to Steyn (2012), all these new changes have a serious impact on the role of the principal. Marishane, Botha and Du Plessis (2011) argue that a school leader espouses four roles on appointment, which are, teacher, governor, change agent, and manager. This scholar goes further to categorise these roles into two: the functional, which is about what the principals do, and the positional, which talks to the context in

which the principals find themselves, in the process of carrying out their leadership tasks (Marishane *et al.*, 2011).

In his study on the roles of principals in providing instructional leadership in rural high schools in South Africa, Taole (2013) argues that principals still do not view themselves as instructional leaders. According to Taole (2013), these school principals feel overwhelmed by the amount of pressure exerted on them, highlighting the fact that they are expected to teach and manage the school at the same time. Furthermore, these principals argue that teaching demands of them to know the content of the curriculum (Taole, 2013). This is also emphasised by Phillips (2012), where he avers that principals feel inadequate to initiate and develop instructional programmes considering the various subjects and learning areas taught in schools, and everyone having its unique pedagogical uniqueness.

The views of these scholars are supported by Marishane *et al.* (2011), who also argue that principals pay more attention to management and administrative tasks, resulting in instructional leadership being relegated to others in the line function hierarchy (Taole, 2013). The results of Taole's (2013) study are in line with a study by the Department of Basic Education (DBE, 2009) that found that there is a lack of clarity about the roles and responsibilities within school management teams for mediation and implementation of the curriculum.

It is evident from preceding arguments that most of the school principals still battle to understand their roles as instructional leaders, and it becomes more complex when they have to implement and enact the part or task. Taole (2013) asserts that even the training programmes for principals on curriculum issues are partly to blame as they do not emphasise and promote instructional leadership by principals.

Kantrowitz, Matthews and Bondy (2007) assert that the master key to the success of a school is the principle of the principal. Scholars of distributed leadership who studied leadership capacities of staff members also concur and acknowledge the value of the role of the school principal (Leithwood, Mascall & Strauss, 2009). Principals' roles are greatly influenced by the leadership style they employ. The influence of the principals' leadership further manifests itself in several key functions they perform, which include among other things, setting direction, creating a healthy school environment,

managing the instructional programme, supervising student outcomes, eliciting stakeholder involvement, and developing the teachers and support staff (Leithwood *et al.*, 2009:7).

We live in times when principals all over the world are constantly expected to provide leadership that is effective and which is results driven (Pollock *et al.*, 2015; Schleicher, 2015; Zepeda, 2017). The work of school principals is increasingly becoming complex and demanding (Pollock *et al.*, 2015) Setting direction – which involves generating and implementing the school vision, setting up objectives and goals, putting measures to raise the bar on expectations while encouraging others to follow through the school's mission (Hallinger, 2003; Leithwood *et al.*, 2009).

These activities enable the principals to entrench their leadership in schools. The notion of charting a clear direction for a school through vision and mission and goals has also been endorsed extensively by various scholars (Johnson & Asera, 1999; Nettles & Herrington, 2007). These scholars agree that the actions of the principals are very important, especially personal involvement through school assemblies, newsletters and other communication methods with learners and parents. This will assist learners and parents to know and help realise the school vision and mission.

The environment of the school depends mostly on the principals' initiatives. It is incumbent upon principals to ensure that their school environment is palatable for effective teaching and learning and the climate is inviting (Schoen & Teddlie, 2008). The principals must ensure that the school policies are supportive of progress and success of the school and any other negative elements should be removed. The policies should give room for aggrieved parties to appeal, promote discipline and establish high standard of expectations (McEwan, 2003). Some policies that can help and promote the success of a school include standardised grade scales, setting and communicating high standards and expectations (Nettles & Herrington, 2007).

Ubber and Hughes (1987) agree that another way to create a safe and calm environment is to increase the teaching and learning times as well as learner attendance, instead of principals immersing themselves in administrative tasks most of the time. This, according to McEwan (2003), has a way of influencing the school culture and the principals' effectiveness positively. Furthermore, this will also enable

the principals to develop and model core values and reward positive behaviours that impact constructively on the culture of the school. The principals' behaviour can also influence the environment of the school, according to Deal and Peterson (2009) who, after studying a study on a number of case studies involving principals who were successful in creating healthy and conducive learning environments at their schools, produced themes that emphasised "student-centred mission" and purpose which encouraged all stakeholders.

Most of the behaviours above concur with those of transformational leadership (Hallinger & Heck, 1996). Other scholars who believe that there is a strong reference between the climate of an organisation and transformational leadership include Leithwood *et al.* (2000), who emphasise the leadership style of the principals as paramount to school culture (Barnett & McCormick, 2004; Grayson & Alvares, 2008; Hallinger & Heck, 1998; Krüger, Witziers & Sleegers, 2007).

In their study on effective leadership, Leithwood *et al.* (2009) cite four key leadership functions. Managing instructional programme is one of the key factors, emphasising the improvement of instructional performance. Other authors like Krasnoff (2015:4) further assert that the principal must focus more on classroom instruction. They believe the more the principal spends time on instruction, the better for a whole range of factors.

This does not mean that the principal should always be teaching in class, but a keen interest in and focusing on challenges teachers experience, while scrutinising learner performance is critical. It is not expected that the principal should know or be a master of all subjects (Hallinger, 2003), but responsibilities like supervising and evaluating instruction, allocating relevant staff duties, providing resources, and monitoring students' progress are critical. All these functions fall under the management side of the principal's leadership.

An effective principal is expected to monitor and track student behaviour in the whole school. This function is quite often delegated to deputy principals and heads of departments; however the principal ultimately carries the accountability (Leithwood *et al.*, 2009; Scribner, Hager & Warne, 2007). Bookbinder (1992:60) avers that the supervision of student outcomes manifests in two ways, which he calls the

administrative and educational roles. In working with relevant educators, the principal must monitor learner progress, tracking learner performance by studying school records and discussing mechanisms to improve with educators.

According to Mandarin & Honey (2009), a new and popular way of tracking learner performance is through data analysis. Although data have always been there and used by schools, it is now compulsory for principals to base their accountability and decisions on available data (Mandarin & Honey, 2009). The use of data has proven to be very informative and effective, and can assist in making informed decisions (Carrigg & Kurabinski, 2009; Caldarella *et al.*, 2011).

The US Department of Education's No Child Left Behind (NCLB) Act of 2001 made it compulsory for schools to use data in order to support their decisions. Spelling (2005:1) sums it up vividly:

Information is the key to holding schools accountable for improved performance every year among every student group. Data is our best management tool. I often say that what gets measured is done. Once we know the contours of the problem, and who is affected, we can put forward a solution. Teachers can adjust lesson plans. Administrators can evaluate curricula. Data can inform decision making, thanks to No Child Left Behind, we are no longer flying blind.

School principals perform many functions and this has led to many authors admitting that these functions cannot be executed effectively by the principal alone (Leithwood *et al.*, 2009). Hence, Mayrowetz (2008) believes that it can be in their best interests to share and distribute some leadership roles to other members of staff. Other scholars (Cox, 2005; Jimerson *et al.*, 2006; Nettles & Herrington, 2007), also add that the broader community structures and the parents of the learners are critical role players in all the efforts to improve learner performance, provided they are strategically involved by the principals.

Other authors support the idea of Professional Learning Communities (PLCs), which are teams of educators who regularly work together to share ideas and taking collective responsibility for the improvement of teaching and learning (DuFour, DuFour & Eaker, 2009; Mullen & Hutingier, 2008; Vescio, Ross & Adams, 2008; Wood, 2007). The success of PLCs is attributed to the expert collaboration of best practices by

teachers and other staff members (Wood, 2007). This is supported by Brandon *et al.* (2018:264) where he asserts that “shared distributed and collective approaches to overall instructional leadership deepen and widen the impact”.

One of the critical functions of school principals is to evaluate teacher performance and come up with developmental programmes aimed at teacher effectiveness and performance improvement. This can occur in various ways, including the PLCs mentioned above, formal and informal training, establishing study groups, and personal mentoring of good practice, among others (DuFour *et al.*, 2009). The TLCs are described by Timperley (2011) as efforts by several professionals who team up to learn more jointly about their craft in order to improve student learning. According to Wahlstrom (2012), instructional leadership depends on two complementary parts, “the ‘ethos’ – where leaders aim to build a culture that supports continual professional learning, and ‘actions’ – school leaders are involved in explicit engagements with individual teachers about their own professional growth”, however this is more evident in primary schools than in secondary schools (Wahlstrom, 2012:68).

2.9 CHARACTERISTIC BEHAVIOURS OF INSTRUCTIONAL LEADERS

Numerous scholars have made various attempts to present what leaders do, how they behave, and what qualities they must have, and how they deal with different situations. More often, principals are defined by the depth at which they drive the delivery of instruction in their school. According to Rutherford (1985:32), effective principals

Have clear, informed visions of what they want their schools to become – visions that focus on students and their needs; translate these visions into goals for their schools and expectation for their teachers, intervene in a supportive or corrective manner when this seems necessary.

Of these, some behaviours have been more recurrent where strong principals: exhibit commitment to academic goals, create a climate of high expectations, function as instructional leaders, are forceful and dynamic, consult effectively with others, create order and discipline, marshal resources, use time well and, evaluate results. These characteristics also depend on the personal attributes of the individual, and require a principal to be a forceful and dynamic professional, full of energy, with high levels of

assertiveness, being capable of initiating things, open to new ideas, tolerant, have a sense of humour, is very analytical and has a practical stance towards life. In the same vein, it is important to connect leadership and management practice with teaching and learning (Katewa & Heystek, 2019).

In a study conducted by Hallinger *et al.* (2017) in Vietnam, where they investigated the principals' on instructional leadership in Vietnam, it was found that; (1) The principals' actions are heavily influenced by cultural norms of hierarchy and collectivism; (2) The role of Vietnamese principals is fundamentally constructed from their responsibilities as government officers in the education bureaucracy and political representatives of the Communist party in the school; (3) Therefore the structures, political guidelines and socio-cultural values press principals to assign greater priority to their political and managerial roles than to their instructional leadership role; (4) Despite the recent adoption of national politics that seek to decentralise decision making and empower teachers, formal power and influence remain concentrated in the principal with a general reluctance among teachers to assume greater involvement in decision making; and (5) Principals engagement in the instructional leadership role has been described as "confused, lacking coordination, causal and arbitrary, unsystematic, and formalistic" (Hallinger *et al.*, 2017:224).

This therefore supports many other scholars in the educational leadership where they maintain that focus must be on the 'core set of leadership practices' that enhance student learning (Leithwood *et al.*, 2010). Their assertion is further enhanced by more scholars who add a caveat that the enactment of these 'core leadership practices' varies according to the different social contexts (Day & Leithwood, 2007; Hallinger, 2011; Hallinger & Bryant, 2013a; Leithwood *et al.*, 2012; Hallinger & Walker, 2015). This brings an understanding that leadership practices employed in one context of society may be interpreted and applied completely differently in another context and also produce different effects on the organisation (Hallinger *et al.*, 2017).

2.10 REQUIREMENTS FOR STRONG INSTRUCTIONAL LEADERSHIP

Instructional leadership is not only focused on technicalities like curriculum implementation and administrative duties. It is, however, concerned with the people, their actions, relations and symbols used to express their association with the school

(Katewa & Heystek, 2019). This shows that there is a very strong link between instructional leadership and the school culture. Smith and Andrews (1989) believe that there are certain critical qualities of a strong instructional leader, which require of the principal to prioritise curriculum and issues pertaining to instruction, and be dedicated to the goals of the school and the education department.

When principals engage in more meaningful and sustainable improvements at their schools, they will be able to manage time they spend on putting out fires and will also re-orientate their daily managerial activities. This, however, requires of principals to have a mindset shift in their understanding of the nature of leadership practices they employ, and this is where the distributed leadership perspective becomes insightful (Spillane, 2017). Some scholars have identified a few obstacles which serve as impediments to the implementation of instructional leadership: according to Goddard (2003), instructional leadership is hierarchical by nature, and mostly allocates power to the principal to serve as curriculum expert and supervisor of curriculum and instruction. On the other hand, Hallinger (2003) questions the capability of one leader, the principal, in all areas of the curriculum. Furthermore, as an educator and a leader as well, the principal lacks the time to execute all these roles simultaneously and effectively, which then requires specific professional development to equip them with such skills (Hallinger, 2003).

According to Harris (2014), instructional leadership is concerned with leadership influences and practices within the organisation that have an impact on student achievement, while distributed leadership is concerned with the technical core of learning and teaching (Harris, 2009). It is therefore important to note that “instructional leadership and distributed leadership share many [more] similarities than differences” (Katewa & Heystek, 2019:70).

2.11 DISTRIBUTED LEADERSHIP

According to Oduro (2004:4), distributed leadership was formally recognised as far back as 1250 BC. This makes it count among the most ancient in the history of leadership theories. Modern scholars such as Harris (2009:3) and Gronn (2000) went further and formulated a definition for this theory, showing and proving that distributed leadership has indeed evolved. Gronn (2000) defines distributed leadership as a

combination of functions carried out and executed by a group of people. Scholars of leadership only began espousing this concept now recently in the new millennium. Hence, Harris (2009:3) believes that “it is an idea whose time has come”.

While scholars keep on hammering on the importance of distributed leadership, Conger and Pearce (2003:7) believe it was only around the mid-1990s that it became possible for such a theory to be entrenched, after having been mainly derailed by ancient traditional stereotypes. The reasons for this shift of mind-set, according to these scholars, are the increase in cross-functional teams, the pace of delivery, accessibility of information, and the increased difficulty of the job.

Lipman-Blumen (1996) cites increasing global interdependence and demands for inclusion and diversity as the main forces behind the increase, which also highlight the shortcomings and limitations of a more individualistic understanding of leadership. According to Blumen (1996), there are still debates around the fact that the leader-centred approach worked very well and provided order and control (although it is illusory), which suited many organisations throughout the 20th century. This is more relevant to the South African education system now than ever before, since it is still grappling with the implementation of instructional leadership, and after transiting from an autocratic era to the current democratic dispensation.

Despite this genuine and general belief and realisation, it is still difficult to forget and eradicate the idea of a one leader who is credited with all the successes, and ignoring the contributions of other equally important (if not more) players, and factors. Perpetrators of this notion include O’Toole, Galbraith and Lawler (2003), who purport that shared leadership is simply counterintuitive for many people. They remain steadfast in the belief that leadership is obviously and manifestly bestowed on an individual. Their examples include Ghandi and Martin Luther King Jr.

According to Elmore (2000:20-23), distributed leadership is founded on five principles: (1) The purpose of leadership is to harness instructional practice and performance irrespective of the part played. Group leadership as perceived by political theories emphasise the part that leadership plays as coalition builders and unifiers of diverse interests. On the other hand, managerial theories promote the effect of leaders as custodians and vanguards of their institutions. In the same token, cultural theorists

emphasise on the functions of leaders as instigators of symbols that draw the needs of individuals together. Elmore (2000) argues that not all these theories capture the core large-scale improvements, because they do not present a direct link between the goals of the organisation and the work that has to be done. (2) Instructional improvement requires continuous learning. For learning to occur, there has to be an enabling environment, which encourages and promotes acquisition of knowledge. It is imperative upon leaders to create environments that promote learning individually and as a collective. These leaders need to ensure that such environments allow individuals to engage freely in robust exchange of ideas and practices without fear or prejudice. (3) Learning requires modelling. Leaders need to be exemplary by portraying the values and behaviour that represent the best of the collective. This means that leaders need to express the kind of learning they expect from others. Such leaders should also be transparent, allowing others to scrutinize their actions as well. (4) Roles and activities (function) of the leaders emanate from the necessary skills needed to support improved learning. The cooperation required for large-scale improvements demands the understanding that learning succeeds and grows out of the differences in expertise instead of differences in formal authority. Leaders need to demonstrate and possess the necessary knowledge and levels of skill in order to command authority and respect. (5) The exercise of authority requires reciprocity of accountability and capacity (Elmore, 2000:20-22). This scholar goes further to assert that if the formal role of the leader requires that the leader hold others accountable for their actions and results, then the leader also has the responsibility to ensure that there is capacity to carry out such actions (Elmore, 2000:22). As a leader, one needs to ensure that one's authority is accompanied by capacity building and support.

The table below demonstrates one possible way of defining leadership roles. This table presents a competitive principle which ideally dictates that the activities people engage in must be in line with the competencies of their roles and never indulge in activities that are beyond or irrelevant to their capacity (Robinson, Hohepa & Lloyd, 2009:126).

Table 2.2: Collective Responsibility Chain (Robinson et al., 2009:126)

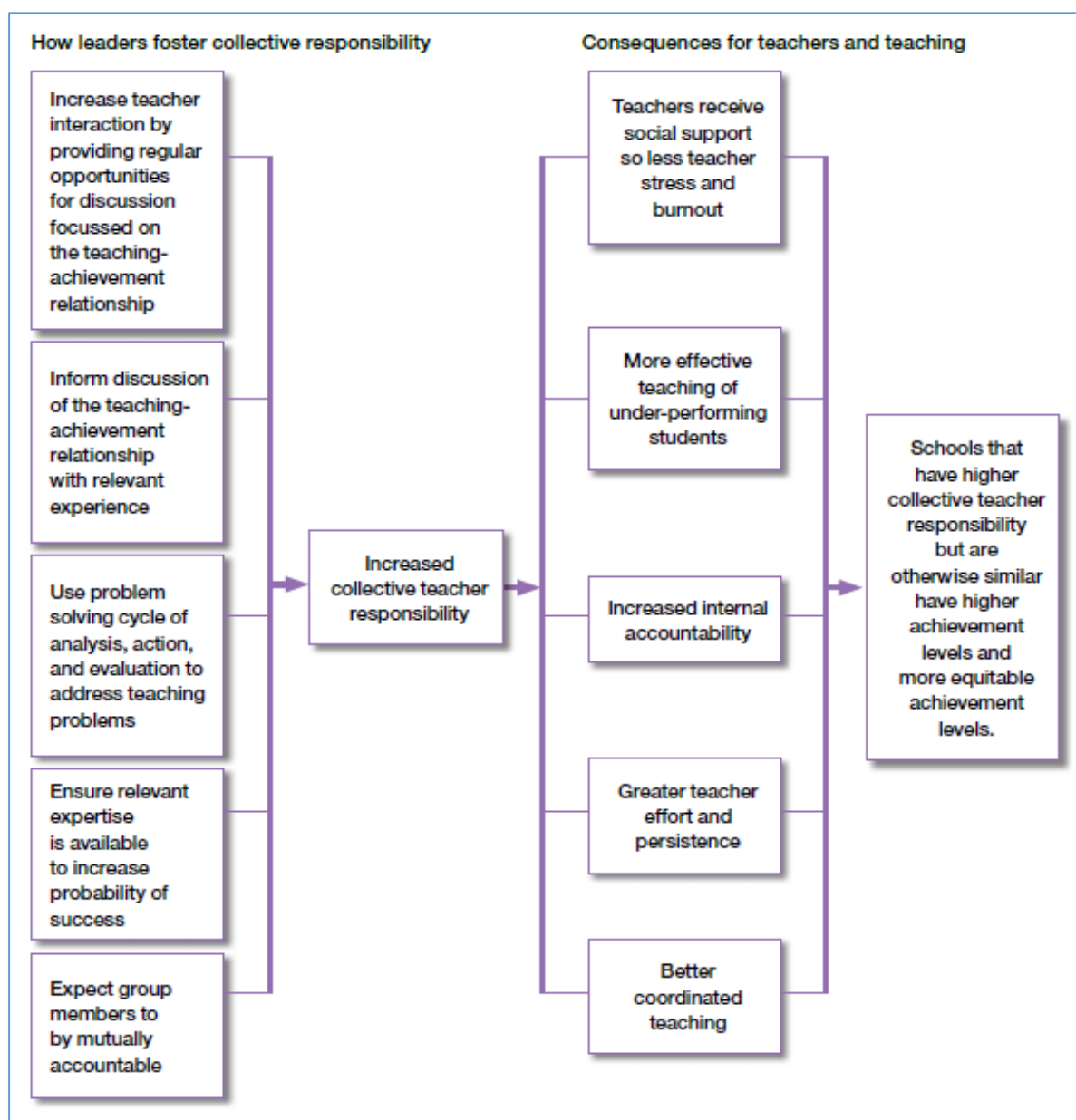


Table 2.2 depicts a model of how distributed leadership can be enacted when dealing with large-scale improvement of instruction. Of critical importance in this table are the principles of distributed expertise, mutual dependence, reciprocity of accountability and capacity, and centrality of instructional practice. Hence Elmore (2000:24) asserts that, “the job of leaders of instructional practice is to extend professional leadership into schools and school systems, drawing upon the differential expertise of educators at each level” (Elmore, 2000:24).

Characteristics of this model include confronting the impulses for privacy and idiosyncratic instructional practice; challenging the conventional roles of policy and administrative leaders in protecting that practice from outside interference; encouraging a model instructional practice as a collective effort and; also promoting a leadership theory that predicts the shortcomings in the social isolation of practice and therefore predict the success in the creation of interdependencies that stretch over these differences (Elmore, 2000:22).

The school improvement literature has consistently underlined the importance of teacher involvement in decision-making processes and the contribution of strong collegial relationships to positive school improvement and change (Nias, Southworth & Yeomans, 1989). It has been shown that effective schools have tighter congruence between values, norms and behaviours of principals and teachers, and that this is more likely to result in a positive school performance.

These empirical studies emphasise the creation of fertile opportunities for teachers working collectively with one another in leading development and change in their schools. In order to achieve this, school principals have to work very hard to develop and build capacity of their staff members, especially teachers, in order to sustain best output. It is therefore imperative for school leaders to employ distributed leadership together with trust and social cohesion in order to enhance the human potential and capacity in their schools (Fullan, 2001; Newman & Wehlage, 1995). However, in an environment where principals demonstrate efficacy in pedagogy and lead teachers in learning and adopting effective strategies, teachers can be both motivated and energized to implement fresh approaches to teaching.

The new evidence therefore indicates that distribution of leadership is common in schools, but patterns of distribution vary and the distribution of leadership responsibility and power contrasts according to local context (Spillane, 2017). Furthermore, research suggests that the pattern of progressive and selective leadership distribution over time is determined by four factors: Firstly, the head teacher's judgement of what is right for the school at different phases of its development; followed by the head teacher's judgement about the readiness and ability of staff to lead; thirdly, the extent to which trust has been established; and lastly, the head teacher's own training, experience and capabilities (Day & Sammons, 2016:54).

A study by researchers (Hallinger & Heck, 1998; Klar, 2012), highlights the points mentioned by principals in their discussions of integrated leadership styles, where they specifically elaborated on collaborative and shared leadership in order to achieve improvement in their schools. This therefore mitigates the fact that distributed leadership does not replace instructional leadership, but directs specific focus and practice towards its successful application. Furthermore, Woods and Roberts (2016) link the democratic principles of distributed leadership to social justice and the fluidity of leadership in a distributed approach, which then allows the officially appointed leaders and other informal leaders to collaborate.

2.11.1 Effective distributed leadership factors

Many educational leadership scholars support the claim that distributed leadership is a decision-making and influential practice exercised by different personnel at multiple levels instead of one predominant leader at the top (Elmore, 2000; Harris, 2009; Hartley, 2007; Lashway, 2006). According to Hartley (2007:190), “the majority of South African schools function in contexts which are generally not conducive to distributed leadership. The transformation of the South African education system since 1994 has resulted in what one school principal referred to as ‘policy overload’. In an effort to deal with this transformative initiative, educators have generally become strained and spent, and increasingly unmotivated and frustrated”.

This is as a result of the manner in which distributed leadership is practiced which, according to Naicker and Mestry (2013), is caused by principals’ reluctance to share power. These scholars assert that principals need to learn that they can share power and decision making with others. Furthermore, they believe that if distributive forms of leadership structure of schools, and structures such as networks or webs can be introduced, the principals’ role can more easily become that of a facilitator, mediator, coach and supporter, thereby encouraging a more collegial school atmosphere.

Mestry and Naicker (2013:12) go further to point out that “based on the distributive leadership approach, a principal alone cannot be held accountable for the leadership and management of a school”. They recommend that accountability be shared with those people inside the schools that principals share power with, and whose joint endeavours determine school outcomes. Spillane (2006b) also speaks of the sharing

of power among teachers and principals as 'essential' to the success of site based management and shared decision-making strategies. He argues that distributed leadership is first and foremost about a leadership practice, which transcends beyond positions to interactions throughout the school community and not just focusing on the actions of the hero leaders.

According to the Wallace Perspective (Wallace & Wallace, 2013:6), which is a wide review of more than 70 research reports and meaningful publications on school leadership, effective school leaders and principals perform five key activities. The first and most critical is to generate an inclusive vision of academic excellence for the entire school. The second one is to create a hospitable and conducive climate for successful teaching and learning. Thirdly, to develop leadership in other members of the staff. This is followed by improvement of instruction using modern techniques; Lastly, to manage information, people, and processes to advance school improvement (Wallace & Wallace, 2013:4-17).

In the study by Louis *et al.* (2010) it was found that where principals have created an enabling and encouraging environment and climate for teaching, the teachers were supportive of the principal. This gave rise to such principals achieving high scores in their performance evaluations. The same happened with principals who inspired their teachers and staff to lead in various areas of their operations. According to Louis and Wahlstrom (2012:25), "leadership practices targeted directly at improving instruction have significant effects on teachers' working relationships and indirectly on student achievement and that, when principals and teachers share leadership, teachers' working relationships are stronger and student achievement is higher".

Scholars from the University of Washington (Honig *et al.*, 2010) agree that most of the effective principals pay more attention and focus on the quality of instruction. This they do by inculcating and encouraging high expectations among teachers while on the other hand ensuring constant support to them. They go further to highlight the importance of the principals' visibility in the school and their ability to observe teaching and learning in progress, and at the same time giving immediate feedback.

According to Blasé and Blasé (2000), teacher perceptions include the fact that effective principals are those that display teaching skills and techniques in classrooms and

conferences. These principals are more involved and interact frequently with students, which in turn result in positive behaviour all round. Another important aspect of this research is that it illuminates the effect of praise on teachers. They discovered that praise evidently improves teachers' motivation, self-esteem, and efficacy, and encourages "teacher reflective behaviour, including reinforcement of effective teaching strategies, risk taking, and innovation/creativity" (Blasé & Blasé, 2000:34).

Westerberg (2013a) also agrees that effective principals need to articulate a clear vision of effective instruction and assessment. He gives a few examples of how such vision manifests, namely: A common language used to communicate instruction and assessment concepts with principals being closer and familiar with the techniques of teaching by reading broadly on professional literature. He also recommends that principals attend conferences, and work with other professional bodies and networks. Furthermore, principals must be willing to share their knowledge and skills with other teachers and colleagues who have the same goals. He therefore concedes that principals can also make use of departmental meetings to model high quality instruction and should participate in the planning, implementation, and evaluation of quality professional development programmes for teachers. Lastly, he asserts that education administrators must be acknowledged as partners in collaborative relationships and must exhibit knowledge and skill in pedagogy.

Yukl (2010) asserts that leadership is a process where people are influenced to understand and agree on what should be done, how it should be done, and the processes involved in achieving the shared objectives both as individuals and as a collective. The role of leaders in institutions received intensive attention in countries like England, where they instituted a National College for the Leadership of Schools and Children's Services. The focus of this action was on training, professional development and provision of relevant qualifications for school leaders.

Realising the importance of and relationships between leadership and teaching there was a need to merge the national college for Leadership of schools and children's Services and the National College for Teaching. This gave birth to a new institution called the National College for Teaching and Leadership in 2013. The main objectives of this new academy was to improve the quality of the workforce, and to forge collaboration among schools to assist each other in order to better their performance.

Major improvements in schools' performance in England can be attributed to the Office for Standards in Education (Ofsted) Framework. This is an agency entrusted with school inspections, where they conduct quality assurance and public accountability.

Matthews and Sammons (2004:52), from the National College for Leadership in England, sum up the work of school leaders as follows, linking it with what should happen in the classroom: Effective head teachers provide a clear vision and sense of direction for the school. These principals agree that head teachers should provide a clear vision and set the direction for the school, while also prioritising activities according to their level of importance.

They focus their staff's attention on what is important, and do not allow them to be distracted by other initiatives that have little or no value to the learners' outcomes. Matthews and Sammons (2004) agree with the other scholars that principals should know what is taking place in their classrooms, and should also take it upon themselves to know the weaknesses of their staff and build on their strengths. These scholars believe this will enable them to channel all the staff developmental programmes towards addressing the real needs of their staff and the school as a whole. One way that can also help is through constant and systematic monitoring and evaluation processes in their schools. These scholars assert that principals' clarity of thought, purpose, and knowledge of what is taking place at their schools enable them to influence what happens in classrooms and therefore raising the learners' outcomes (Matthews & Sammons, 2004:52).

Spillane (2017) asserts that the vantage point of distributed leadership is that it provides a powerful lens for understanding the ways in which leadership practice occurs. It also provides an organising principle for selectively involving more members of the school community in the improvement process and in so doing gaining both more diverse perspectives into the underlying causes of challenging problems and a shared commitment to the solutions that emerge. This scholar believes distributed leadership is able to expand one's attention beyond the actions of individual leaders to their interactions with others that lead to the joint activity that underlies virtually all leadership energy in schools (Spillane, 2017:15).

2.11.2 Standards for head teachers in England (DFE, 2015)

England has managed to develop National Standards for Head Teachers. These standards focus on the six critical areas of management and professional leadership. They include: Shaping the future; Leading teaching and learning; Developing themselves while working with others; Managing the organisation; Securing accountability; and Strengthening the community (DFE, 2015:5). The school leader generates a shared vision and develops strategic plans that create collegial relations and harmony in the school and the community.

School principals have to raise the bar with regards to the quality of teaching and learning in their schools, and therefore ensuring that all learners achieve expected outcomes. This means principals need to establish a culture of 'success', where learners will be effective, motivated, on their own, and determined to learn for life. Creation of healthy relationships among stakeholders and establishing strong professional learning communities is supported by performance management, which leads to effective and relevant professional development for all staff, ensuring the key pillars of school management are in place, including self-evaluation, organisation and management of people and resources.

Strengthening the community ensures that head teachers accept responsibility for their schools' performance and are accountable to parents, students, carers, governors, local authority and the entire community. They also have to establish sustainable relations with other schools in the community, parents, carers and other community based structures, in order to share expertise and other programmes that may benefit their schools (DFE, 2015:5).

2.11.3 South African Standard for Principals (RSA, 2017)

The Department of Basic Education (DoE) in the Republic of South Africa has likewise developed a comprehensive document on the standard required for principalship. The standard is aimed at improving professional levels of leadership and management of South African schools, such that learners can benefit optimally and enhance the quality of education in general. While the standard pays specific attention to school principals, it also goes further to emphasise and encourage shared leadership. It is believed that this standard will entrench strong cooperation among good principals and that they are

not expected to work in silos, “but to herd and direct their schools in professional ways that are grounded in and embraced by the principles of Batho Pele and Ubuntu” (RSA, 2017:20-21).

The South African standard for principalship’s emphasis is on the following key focus areas, which should be applicable to all schools: (1) Leading teaching and learning in the school; (2) Shaping the direction and development of the school; (3) Managing quality of teaching and learning, and securing accountability; (4) Developing and empowering self and others; (5) Managing the school as an organisation; (6) Working with and for the community; (7) Managing human resources (staff) in the school; (8) Managing and advocating extramural activities (RSA, 2017:20).

Apart from the eight key focus areas highlighted above, this standard is supported by the actions, activities and the relevant as well as the critical knowledge required from the school principals. The standard is preceded by some elements of policy on the South African Standard for Principalship, which include: (1) understanding the core purpose – with emphasis on the core purpose of principalship, and underpin the principals’ activities in leadership and management; (2) possesses educational ethics and social values – which talks to the core values that drive all activities at schools and inform the principals as to what needs to be done; (3) processing skills and knowledge to the key areas of principalship, which directly refers to the eight key areas of skills and knowledge that principals should possess; and (4) exhibits and commands the necessary personal and professional qualities – where personal quality traits influence the way the principals execute leadership and management roles (RSA, 2017:20). These elements provide answers for questions such as: “Why does a school principal take a particular action? What are the main functions of principalship? How are the main functions of the principal fulfilled effectively?” (RSA, 2017:21).

A significant number of South African scholars have produced a plethora of literature in support of effective school leadership and management. This body of literature can contribute to a greater extend in empowering principals’ practices and improving performance in their schools. (Bush *et al.*, 2010; Christie, 2010; Roberts & Roach, 2006). The standard for principalship in South Africa is in line with that of England that was discussed earlier, even though the latter’s emphasis is only on six critical areas.

Mestry and Singh (2007) posit that many school principals commence their careers as teachers and then progress to principalship through the ranks. This has created a popular perception that the teaching profession is fundamental to them and that they only need professional qualifications and experience in teaching in order to become principals. However, according to research (EASA, 2011), good teaching abilities are not necessarily an indication that the person will be a capable educational manager.

Principals at South African schools are still expected to teach, in terms of departmental policies and legislation. The *Employment of Educators Act* (no. 76 of 1998) and the *Personnel Administrative Measures* are specific to the roles and responsibilities of educators. This is in spite of the enormous responsibility placed on the principals to deliver good results and run effective and vibrant schools. The available literature does not support the fact that school leadership preparation leads to school improvement (Lumby, Crow & Pashiardis, 2008: 5). However, Bush (2010: xi) asserts that in order for school improvement to be sustainable, principals will have to redefine their role as professional leaders, and pay more attention on leadership for learning.

Bush (2008; 2010) avers that there is a growing awareness that school principalship is a specialist occupation that deserves specific and specialised preparation. His paradigm is influenced by the following important reasons: The role of school principals has dramatically increased; in the decentralised systems, the workload and responsibilities of leadership have increased. As a result of the ongoing difficulty and complication of the school sphere; principals have to engage with their communities to lead and manage effectively. Acceptance that prepares leaders is a moral obligation; it is imperative that principals be trained before they are appointed. It is acknowledged that effective preparation and development make a difference; when principals are exposed to a specific training, they develop into better leaders, yielding improved outcomes in their schools.

Looking at these and the *Standards for Principalship* that has been generated in South Africa, it is hoped that future principals will be adequately prepared and inducted accordingly in order to avoid the 'culture shock' as purported by Daresh and Male (2000) and Mathibe (2007).

A study conducted by PricewaterhouseCoopers (2007:10-11) concludes and recommends some critical areas of responsibility for heads of institutions. What is interesting is that these key areas were proposed by the principals themselves. The study makes recommendations that: School principals must have accountability; strategy; networking skills; be involved in daily operations; and manage teaching and learning. The study calls upon the principals to fully assume their responsibilities, and spend time executing their duties. They should have a strategy to establish the school's ethos and strategic plans, while also managing teaching and learning, ensuring that teachers teach and learners learn. Emphasis is also placed on human resources issues, with special attention given to recruitment and professional development of staff. Collaboration with other schools and community organisations, and involvement in the day-to-day running of the schools by principals are also recommended (PWC, 2007:10-11).

According to Bennet *et al.* (2003), distributed leadership is not an action performed by a single person to others, but a collective of persons' actions where all contribute towards realising the goals of an organisation. Spillane and Diamond (2007) came up with two aspects of distributed leadership perspective: the leader-plus aspect, which acknowledges and recognises the efforts of all individuals who contributed towards leadership and management practices, and not only those in formal positions; and the practice aspect, which is focused on the practice of leading and managing as a product of leaders, followers, and their context.

2.11.4 Shared leadership

Practices of leadership are meant to enhance teaching and also improve relationships in the workplace, while at the same time supporting student achievement. The sharing and delegation of leadership among principals and teachers also increase student outcomes. According to Berjaoui and Karami-Akkary (2019), participative approaches to leadership where teachers have more authority to influence decision-making on issues that matter to them are associated with effective leadership resulting in a greater sense of teacher efficacy; an increased level of trust; greater job satisfaction; greater sense of ownership; and commitment to the organisation.

Sharing leadership between principals and teachers can also be enhanced by the leader supporting and promoting the PLCs, and these again improve students' results. According to Brandon *et al.* (2018:286), "effective leadership strengthens professional community, a special environment within which teachers work together to improve their practice". Professional learning communities (PLCs) are mainly credited with the improvement of classroom practices that enhance learner achievement. This credit is given to the PLCs, because there was a new environment at schools that propelled learners to perform much better than they did in their school classrooms. In the United States of America, a number of scholars (Day & Leithwood, 2007; Moos, Johansson & Day, 2012; Ylimaki & Jacobson, 2011; Louis *et al.*, 2010) argue that the factor of trust is less significant than the factors of instructional leadership and shared leadership (although it is associated with both).

Furthermore, in a study conducted a few decades ago by the 20-country International Successful School Principals Project (ISSPP), a comprehensive empirical evidence emerged emphasising that values of leadership, qualities and strategies are key ingredients that account for the differences in learner achievements between and among schools (Day & Leithwood, 2007; Moos *et al.*, 2012; Ylimaki & Jacobson, 2011).

In another investigation conducted by Louis *et al.* (2010) in the United States, where they wanted to find the links between leadership of schools and student learning in 180 schools and 43 education districts in North America, it was also discovered that a principal's leadership counts for more than the rest of the staff. School variables, when considered separately, indicate only a small impact on student learning. In order to obtain large effects, educators have to create synergy across the relevant variables. "Among all the parents, teachers and policy makers who work hard to improve education, educators in leadership positions are uniquely well positioned to ensure the necessary synergy." (Louis *et al.*, 2010:9). Principals can enhance teaching and learning directly or indirectly in various ways at their schools. This involves working on their motivation, commitment, and improving the conditions under which they work.

What is critical among school leaders in order to affect learner achievement and indeed learning, is to focus their attention on the teachers' performance in class. The staff performance must include the skills and knowledge, commitment, and motivation levels of their staff as well as their work environment. Principals worldwide have lately

been directed and strongly encouraged to pay special attention to instructional leadership, as they seek to build capacity among their staff and equip themselves with the latest content knowledge of the curriculum.

2.12 CONCLUSION

This chapter looked at a wide scope of literature with special reference to the key conceptual framework within which the study is located. Leadership as a phenomenon was given attention while priority was on distributed or shared leadership as well as instructional leadership. According to Louis, Dretzke and Wahlstrom's (2010a) study in the United States, the implementation and application of instructional leadership are easier to implement at elementary schools than at secondary schools. They argue that secondary schools have a very broad curriculum and are much bigger in size than the primary schools.

However, Sammons, Thomas and Mortimore (1997) feels that the task of instructional leadership implementation would best be placed in the capable hands of heads of departments in schools, a view that has been opposed by many scholars as shown in this chapter. These studies emphasise that for these curriculum improvement initiatives to succeed, adequate opportunities have to be created to promote and encourage collegial relations among teachers.

An increasing body of evidence points towards the importance of capacity building as a means of sustaining school improvement (Fullan, 2001; Newman & Wehlage, 1995; Sergiovanni, 1992; Chapman & Allen, 2006). It has also been contested that distributed leadership forms the basis and nucleus of every capacity-building model and this includes social cohesion and mutual trust. These scholars argue that leadership, in this context, is embedded in the capacity of human resources that exist in an organisation.

In this chapter I explored international as well as local literature focusing mainly on literature that relates to the research questions and which sought to establish how principals go about their day-to-day roles and duties in pursuit of excellence, as well as how they are able to strike a balance in all they do. The next chapter will discuss the research methodology used to drive this study.

CHAPTER 3:

RESEARCH METHODOLOGY

3.1 INTRODUCTION

Chapter 2 of this study gave an overview of the literature around leadership, management, instructional leadership, as well as distributed leadership. In every investigation, the researcher has to choose a vehicle that will drive the research and, according to Briggs and Coleman (2007), research methodology navigates all the activities of the study. The focus in this chapter is on research methodology and design for this particular study. This investigation employed a qualitative approach, which is informed by the main research question and in line with the topic. In this chapter, I detail the purpose of the study and the research design, which includes data collection strategies based on observations, interviews and document analysis, and the choice of sample used. The chapter concludes with ethical issues and the limitations of the study.

3.2 RESEARCH QUESTIONS

This study was anchored on one main research question, supported by four sub-questions to navigate it into the desired direction. Based on the main research question: “How do principals go about carrying out their dual mandate as instructional leaders and managers of schools in South Africa?” the following critical questions were answered in order to guide the investigation:

- What are the policies that guide the work of school principals in South African schools and how do principals make sense of these policies in their day-to-day work?
- What structures and resources do school principals rely on to carry out these policy guidelines in their dual mandate of management and instructional leadership at schools?
- How do principals go about their day-to-day practice of leadership of schools and how is the balance achieved, if at all?

- How can we explain the success of some school principals with regard to the challenge of balancing management and instructional leadership at their schools?

The table below presents an overview of the chapter at a glance.

Table 3.1: Research methodology overview

Research Topic	Principals' narratives on balancing leadership, management and instruction in South African schools.
Research method	Qualitative
Design	Case study
Research (data collection) instruments	Interview protocol Observation tool Document analysis rubric
Selection of participants	Purposive sampling: Six school principals selected from progressive and highly performing schools Convenience sampling: Selected principals are those the researcher was able to access, who therefore became the research participants.
Data collection methods	Semi-structured interviews Observations Document analysis
Ethical consideration	Researcher was a non-participant observer who obtained informed consent from the participants. Permission letters were sought from relevant authorities Voluntary participation. Confidentiality was assured. All participants protected from harm.
Criteria for checking quality	Research study results are to be confirmable, credible and dependable, through member checking and triangulation.

3.3 PURPOSE OF THE STUDY

This study sought to explore and investigate how principals of the selected schools are able to strike a balance between their multi-faceted roles of managing and leading instruction in their schools. I endeavoured to establish how policies, structures and resources available in schools enable principals to succeed in doing their work. It was also critical to me to find out which practices principals employed in order to ensure a balance in what they were doing.

3.4 RESEARCH APPROACH

I followed qualitative study methods in this investigation, which enabled me to collect and analyse data as proposed by Yin (2011), who emphasises the understanding and interpretation of human perceptions and their actions within a broader system of meanings to which those actions are attached.

Qualitative study approaches, have the advantage of probing very deeply into the research settings, enabling the researcher to gain an in-depth understanding of the situation, why it is like that and how participants feel about it (Ballantyne, 2013:13.). In this study, I was more interested in the lives of school principals in their respective environments and their involvement in managerial tasks that yield success.

In an attempt to respond to the critical questions of the study, I decided to follow the qualitative research methodology using narratives of principals in order to understand their experiences in the four schools. Clandinin and Connelly (2000:29) argue that

when we use an event, we think of it as a thing happening at that moment but as an expression of something happening over time. Any event or activity has a past, a present as it appears to us, and an implied future.

According to O'Donaghue (2007:12), research methodology is "the process, plan of action or strategy used to achieve the anticipated results". On the other hand, research methods explain the tools employed to gather relevant data for the study. The approach in this study was to tell stories of the participants, fully cognisant of the value of narratives in reliving past experiences and constituting the future.

The approach employed in this study as stated above allowed me to present explanations and descriptions of principals' narratives on balancing leadership, management and instruction in South African schools. Data were collected through observations, document analysis and interviews. This approach carries a number of critical and relevant advantages as highlighted by Creswell *et al.* (2013), where they describe qualitative research as an approach intent on gathering rich data on a phenomenon in order to create a better understanding of it. It is about individuals and groups of people who look at and understand the world, and generate meaning through their experiences.

The approach in a qualitative study demands that it be conducted in natural settings, where behaviour or setting of constraints are not necessary. In this approach, according to Shasti and Mirzaei (2008), the emphasis is on the “What”; thus no need for quantitative data to describe any phenomena. One of the critical advantages and qualities of qualitative approach is that it calls for a rich description and explanation of every activity that was observed, and must also be presented in the form in which they occurred.

Bush and Amechi (2019:15) believe that “qualitative methods are often perceived to be ‘labour intensive’ and cumbersome”. This approach enabled me to understand more interestingly how principals applied their skills in management and instructional leadership to make their schools centres of excellence, and also illuminate the challenges they face each day of their lives. Narratives compiled in this study will enable the broader community of scholars to continue to probe further in order to assist many other school leaders to deal with challenges faced by principals in their daily activities.

The qualitative research approach is emergent rather than tightly prefigured and it is fundamentally interactive (Marshall & Rossman, 1999), therefore as understanding deepens or situations change, I avoided the state of being fixed into rigid designs that could prevent me from responding and pursuing new paths of discovery as and when they emerged (Johnson & Christensen, 2014).

3.5 RATIONALE FOR QUALITATIVE RESEARCH

The choice of the qualitative method was strategic for me in order to align with the research design. This investigation was based on constructivist theory, which is interpretive by nature, because it is focused on social environment and how participants interact with it. It gave me an opportunity to source first-hand experience of the phenomenon under investigation. It was based on the methods of data collection, which are flexible and sensitive to the social context. The investigation was used to explore a wide range of dimensions of the social milieu, which included the

texture and events of the everyday life, understanding, experiences and imagining of research participants.

The study was also aimed at producing a complete and contextual understanding of a phenomenon based on rich, nuanced and detailed data. According to Creswell (2009:18), qualitative research helps individuals to understand and explain the meanings that participants attach to the central phenomenon of the research study better.

I chose a qualitative method because the study was based on the daily occurrence of events, products, and outcomes as well as the participants' perceptions and experiences as they carried out their mandated duties. This qualitative study focused on interviews, observations, and document analysis. This type of research humanises the problem and data, and also provides a holistic view of the phenomenon under review, enabling me to attach emotions and feelings of participants to it. It provided me with a diversity among idiosyncrasies and the unique quality of the persons and processes involved in the study.

I decided to follow the six steps as outlined by Slavin (2007), where I started with the identification of what needs to be investigated. Based on the topic for this study, I posed a critical question as to how principals go about their dual mandate as instructional leaders and managers of schools in South Africa. This formed the basis for this investigation, which sought to obtain narratives of principals of well-run and high performing schools.

3.6 RESEARCH DESIGN

Slavin (2007:9) avers that research design is a detailed plan of action used to collect and analyse data. Creswell and Plano Clark (2006:53) assert that "research designs are procedures for collecting data, analysing, interpreting and reporting on data collected in a research study". McMillan and Schumacher (2008) believe that the research design depicts the type and framework of participants chosen, their location and period of engagement. The background and experiences of both the researcher and participants determine the choice of a research design (Creswell, 2013); yet, according to Yin (2017), the choice of research methods depends on research questions and the context in which the study occurs. This qualitative study was based

on a multiple case study comprising six conveniently and purposively selected school principals drawn from six purposively identified schools.

A case study, according to Harling (2012), is a holistic inquiry that investigates a contemporary phenomenon within its natural settings. Yin (2017) agrees that a case study is a method of learning about a complex phenomenon through extensive description and analysis of that instance in its contextual settings. I opted to use this design as it provides for a thorough and in-depth investigation of a particular phenomenon in its real-life context and, as supported by Yin (2008:18), since the boundaries between a phenomenon and its context may not always be clear; a case study relies heavily on multiple sources of data as evidence.

Harling (2012) classifies case studies into three groups, namely the intrinsic, instrumental and collective case study. In this case I opted for the collective case study in order to get down to a general problem. This is emphasised by Harling (2012), when he argues that a collective case study is carried out to provide a general understanding, using a number of instrumental case studies that occur at the same site or come from multiple sites, addressing the degree to which the focus is the unique or the generalisable features of the case.

3.7 RATIONALE FOR CASE STUDY DESIGN

According to Harling (2012), a case study is a holistic inquiry that investigates a contemporary phenomenon within its natural setting. He asserts that a case study describes a method of learning about a complex phenomenon through extensive description and analysis of that instance in its contextual setting. I decided on a collective case study design based on the following reasons: (1) A case study is intended to conduct an empirical inquiry that aims at investigating contemporary phenomenon, keeping the context intact to get in-depth knowledge.” (Collis & Hussey, 2009; Mujtaba & Preziosi, 2006). (2) It enables the investigator to conduct a holistic and meaningful enquiry, collecting in-depth and detailed data that are rich in content from a variety of sources (Harling, 2012). (3) It allows the researcher to retain holistic and meaningful characteristics of real life events (Kohlbacher, 2006). (4) A case study

is an all-encompassing method that covers the logic of design, data collection techniques, and specific approaches to data analysis (Yin, 2003:17).

Yin (2003:13) asserts that one should consider the following four points when using a case study approach. When the purpose of the study is to answer “how” and “why” questions, the behaviour of participants in the study may not be manipulated; the researcher seeks to explore contextual environments since they are thought to be important in order to answer the research question.

The benefits and importance of a case study research approach are enormous. A case study provides an opportunity to scrutinise an organisation or individual; how it works; and how an individual interacts with those around him/her and the environment in which their interaction unfolds. Furthermore, the approach enables the researcher to gather various kinds of data about a phenomenon. It also assists the researcher to pay a particular attention and confine the research within the specific space and time.

In this study the principals were individually interviewed at their schools in order to obtain an in-depth understanding of their practices and roles. The use of narratives was adopted to offer a better understanding of the phenomenon and was also used to explain the trends established in the past.

In order to understand this chapter and the overall study on this topic, it is important to understand the methodology through the minds of a few scholars. Scholars like Leedy and Ormrod (2005:85) assert that “a research design provides the overall structure for the procedures that are followed by the researcher, the data that are collected and the analysis of data that is carried out”. This choice was also based on my aspirations and situation, considering the strengths and weaknesses of the chosen environments.

It also proved whether the question(s) set for the study would be answered fully and satisfactorily through deployment of strategic processes of collecting information. Slavin (2007) puts it succinctly that a research design is the all-encompassing plan for collecting and analysing data, which will lead to answers to research questions. Here I sought to codify the sentiments of the participants pertaining to the way they carry out their duties and how they accomplish their success if they do.

Research methodology is the strategy, plan of action, the process or design behind the choice and the use of methods to reach the desired outcomes (O'Donaghue, 2007). According to Schram (2003), research methods represent specific procedures, tools or techniques used in a research to produce and analyse data. Research methodology therefore describes the way data and knowledge are discovered; systems and rules through which a research can be conducted.

According to Suter (2006), research design is about assumptions underlying the manner in which the study is constructed to pursue inquiry about the phenomenon. However, Leedy and Ormrod (2005) argue that a research design provides the overall structure for the procedures that are followed by the researcher, the data that are collected and the analysis of data that is carried out. The choice of the design in this study resulted from the aims and objectives of the study, the context as well as the strengths and shortcomings of every approach.

Since the research methodology in this study is a qualitative approach drawing from descriptive, correlational and interpretive studies, it therefore has an impact on the research design. A descriptive study involves describing a phenomenon in question; moreover, if some scholars have generated some data on it. In this case study, I used the inductive approach, since the investigation is based on a conceptual framework. The conceptual framework does not test ideas, but it is focused more on the broad understanding of how the world works. It can also be undertaken to study some characteristics of a group in an organisation. Its role is to describe aspects of a phenomenon, thus answering questions about 'how' and 'why'.

Qualitative studies can be approached in many ways. This inquiry followed the use of interviews, observations and documents, as I deemed it proper and relevant. This, according to Cohen *et al.* (2009), enabled the production of realistic data grounded on reality, since the variables could not be manipulated. Selected schools where the principals' narratives on balancing leadership, management and instruction were studied presented classical examples of real-life situations, which are common at most South African schools. This was quite helpful to me in terms of understanding the situation in other schools of the same type.

3.8 SAMPLING

According to Best and Kahn (1993), a group of individuals who have one or more similar or common qualities can be regarded as a population. Accordingly, this study focused on the school principals at six of the best and progressive schools as the target population. The schools were selected with a particular purpose based on their nature, and most importantly, academic achievements. McMillan and Schumacher (2010:138) posit that “the researcher selects particular elements from the population that will be representative or informative about the selected together with any documentation presented”.

All these schools are from previously disadvantaged communities, and the selection did not consider age, gender or race. It was solely based on good leadership and best performance. Of the six principals selected, one is a female and the rest are males. Two of the participants are highly experienced principals with more than 20 years’ teaching experience, while others have experience of more than five years as principals. This was not planned, but it emerged from the purposive selection and identification of principals and schools that are well run and high performing. This, according to Krathwohl (2004), is the most popular technique in qualitative research where he argues that subjects should be able to provide the best information to address the purpose of the research.

My choice of purposive sampling techniques enabled me to choose participants who exhibited high potential to provide the necessary data required to address the research questions (Born & Preston, 2016). It comprises choosing participants who are well informed and are easily accessible. In this context, this study was based on principals’ narratives in their own environments, which allowed me to relate what the participants say and what can be visibly observed. This purposive sample from the two adjacent provinces of South Africa, the Free State and Gauteng, ensured that the study was easily executed. Since the schools were within a reasonable proximity to me, travelling did not pose any challenge.

The one major challenge during the study was the unexpected rescheduling of the visits to schools. This came as a result of principals being called to unscheduled meetings during school hours, and also the fact that district and head office officials

visited schools unannounced. This distracted participants, since they had to give them their undivided attention. However, I was able to cover the scope of the work as was intended in the allocated period, since such issues were accommodated in the initial planning of the study. Hence I continued to visit the schools beyond the four initial school days that were planned for, using Saturdays and school holidays.

In pursuit of the problem statement, I was convinced that direct and personal interaction with participants would give this study credibility and objectivity. Most importantly, I wanted to hear narratives from participants themselves, first-hand and in their local settings. This is supported by assertions of Fazily (2012:68) that,

Qualitative research explores lived experiences, in an effort to better understand and ascribe meaning to them. This is mainly achieved by systematically collecting and analysing narrative materials through methods that ensure the credibility of the data and the findings of the research.

3.8.1 Change in the sample size

My choice of participants was strategic, as explained previously, all the chosen school principals were very excited to take part in the study. Data collection went exceptionally well, even though there were times when I had to reschedule my visits due to, firstly, civilian protests that took place in one district. Fortunately this lasted only for a day, and I was able to continue the next day. The second challenge was a teacher strike, where one of the teachers unions called on teachers not to report for duty but stay away for a day. All these resulted in a delay in terms of the completion of my scheduled data collection programme. In the end, I was able to extend my stay at these schools and I continued to visit them even beyond the initial four days, wherein I gathered large amounts of data.

As I continued with data analysis, I realised that I had reached data saturation. I then engaged in a thorough scrutiny and intensive comparison of all six participants and realised that data from two participants were for the better part similar to those of the other two principals in the same district, and therefore the number of cases was reduced to four. The other reason for the reduction was the amount of data I had already collected. It was too much to contain in one research report, especially because I opted to use a qualitative research method, which is very intensive and

detailed by nature. This reduction in the number of participants did not affect or compromise my study in any way, precisely because the two schools that were dropped came from the same district as the remaining two.

3.8.2 Sampling techniques and procedures

From the initial stage of conceptualisation of this study, I decided who would be required to participate in this study and what needed to be done. Sampling is a process of selecting a portion of the population for study purposes (Maree, 2007). This selection must ensure that the researcher is able to answer the research questions. According to Mason (2006), sampling and selecting are used to identify, select and access the available sources where data can be generated. This investigation comprised six school principals (initially), selected from high-performing secondary schools in two provinces of the Republic of South Africa. Purposive sampling, as ventilated by Krathwohl (2004:229), is “a very popular vehicle in qualitative studies due to its focus on participants who can provide rich and relevant data and are easily accessible”.

Patton (2002) believes a small sample that is greatly diverse, may be chosen so that it can give a highly comprehensive explanation of all participants as well as the important and common patterns that exist in all cases. In this enquiry, I opted for purposive and convenience sampling techniques. Convenience sampling, also called opportunity sampling, involves selecting the nearest participant to serve as respondent to the study (Cohen *et al.*, 2009). What is also important here is that the researcher must choose participants or locations that can be accessed conveniently. This came in handy when I decided to reduce the sample size to four.

It is in this context that convenience sampling was used to select schools from two provinces in South Africa, namely Gauteng and the Free State. This type of sampling is convenient, economical, and saves time, according to McMillan and Schumacher (2010). I decided on this sample with the strong conviction that the chosen few had demonstrated their expertise and were well versed with all activities of school leadership. As such, the sample would still be reflective of the rest of the schools in the country.

By contrast, purposive sampling is broadly used to create a sample that will satisfy and answer the questions of the researcher. The researcher has the responsibility to choose who will participate in the study, based on their location, and the type of information they may provide. Cohen (2009) asserts that the participants are chosen because they are able to provide answers to certain questions. While purposive sampling is not representative of a wider population, since it is very selective and biased, it was relevant for this study, because I needed people who are knowledgeable and have demonstrated competence in their respective field of work.

3.9 DATA COLLECTION

Creswell (2007) alludes to the fact that data collection when employed in a qualitative study involves multiple sources and is itself extensive in nature. This study called for the researcher to deploy various data collection methods such as interviews, observations and document analysis and reviews. Creswell (2008) argues that the collection of data involves identifying and selecting participants, securing permission to engage and interview them. Since this was a purposive sample, participants were chosen in such a way that they would give me the data that were required. I followed the five steps prescribed by McMillan and Schumacher (2006), namely: The planning stage; Beginning data of collection; Basic data collection; End of data collection; Completion of active data collection. These steps led me to employ the data gathering tools discussed below.

In a natural setting, a qualitative research becomes a situated activity where data are collected in an environment where participants experience their daily engagements. This provides a better understanding of the depth and interpretation of what a researcher wishes to pursue. According to Maykut and Morehouse (1994:45), “personal meaning is tied to context, and the setting is a place where what is to be known about a phenomenon of interest is to be uncovered”.

3.9.1 Interviews

I elected to use qualitative interviewing, aligning myself with reasons provided by Mason (2006:63), since I intended to engage with participants in terms of asking them questions. The interviews enabled me to be actively involved in gathering data. The

interviews gave me an opportunity to clarify issues and probe much more in order to obtain more information. Interviews were appropriate when dealing with open-ended questions and enabled me to note the gestures and expressions of the participants, which helped to detect the reliability and authenticity of the facts.

This is one of the most popular methods of gathering data, and it enabled me to explore all situations, including but not limited to, people's perspectives, meanings and experiences, definitions of situations and construction of reality (Marshall & Rossman, 2006). According to Merriam (1998), the type of questions the researcher wants to answer usually determine the type of interview required. Hence I had a choice of using highly structured, semi-structured, or unstructured interviews, depending on what information I wanted to obtain. In this inquiry, I opted for semi-structured interviews, which enabled participants to engage freely with me, following clear and direct questions according to my interview protocol. The semi-structured interviews also ensured that I maximised the credibility and trustworthiness of the measurement of key concepts of the study.

The first part of interviews involved introductions and discussions about the study itself. This was followed by the face-to-face interviews with participants. I sought permission from participants to use the audio tape recorder during the interviews, while I took some notes as back-up. This data were later transcribed during the analysis. Maree (2012) asserts that an interview is very important because of its advantage of increasing comprehensiveness of data and therefore resulting in the data collection being more structured. This method was relevant to this study and therefore enabled me to obtain rich narratives from principals (Johnson & Christensen, 2014).

These interviews allowed both my interviewees and I flexibility and were able to adapt to changing environments (Johnson & Christensen, 2014). This applied to techniques of asking questions. During interviews, a lot of quality and valuable information was gathered, and I, as the interviewer, was able to ask probing questions to get more data, while at the same time ensuring that participants remained relevant to the questions asked.

Though the interviews were conducted in a particular order, there was always room for follow-up and unexpected answers and responses. This method allowed the

participants to be free to engage and give their own opinions about their day-to-day activities. The interviews were intended not to obtain answers to questions directly, and not even judging the particular participants, but to gain a better understanding of how principals experience their daily lives at schools and how they make it meaningful, purposive and productive.

One shortcoming of such a method is that it takes a long time, and one is not sure how long participants will take to answer questions. Moreover, one cannot stop or interrupt them in the process. The interviews did not disturb participants because they were held at the end of the school day. These interviews followed Creswell's (2007:74-75) recommended steps, which include, (1) Identification of participants following a purposive sampling technique; (2) Determining the type of interview most appropriate to the topic under review; (3) Using appropriate, adequate and relevant recording procedures; (4) Determining the location of the interviews; and (5) Securing consent and permission from participants and conducting the interviews.

An interview protocol was prepared to ensure that all participants answered the same questions, even though the interviews took place at different locations. This ensured that the interviews remained focused and consistent in nature (Maree, 2007). Each participant was interviewed over a period of four days, with each session lasting 30–45 minutes, depending on how much everyone was prepared to elaborate.

3.9.2 Observations

I used observations as another method to collect data, which would lead to the answers to the research questions. Kumar (2005) posits that observation is a systematic, purposive, and selective way of looking and listening to interaction or phenomenon as it happens. My purpose was fixed on the principals and the way they approach, interact and execute their daily duties, since it is commonly said that knowledge is a social phenomenon, and all information is a result of interactions and relationships. According to Creswell (2012:213), observation is “a process of collecting first-hand and open-ended information by observing participants at their research sites and in their social settings”.

As stated earlier, interviews were held in the afternoons after school hours. From the morning and throughout the day, observations were in progress. Here I was not a

participant, but an observer. It was necessary to prepare for these observations; hence, I prepared an observation protocol. The protocol comprised a set of questions that I answered as the activities unfolded. This made the task of observing very easy and organised. This in fact came about from the results of the pilot study that I conducted prior to the real research with the carefully identified participants. There were times where I was tempted to participate, but I always exercised restraint in order to allow for maximum data collection.

This process also allowed me to collect data from participants in their natural settings, to hear them speak, and see them do their work. At regular intervals and, where appropriate, I was able to throw in a question or two at the participants to understand what was happening at that point in time. During observations, delegation and distribution of duties, instructions, interactions, meetings in progress and normal teaching took place. Throughout the observation process, notes were taken progressively and carefully, while recording every activity as part of field notes.

The following reasons confirmed by Patton (2002:262-264) attracted my attention to use observations as a data collection tool. (1) Observations enabled me to understand and capture the context within which people interact; (2) Observing participants provided me with direct experience of the setting and reality, and getting to be closer to the people; (3) Direct observations also afforded me a chance to learn about things that the participants would otherwise be reluctant to talk about during interviews due to their sensitivity; (4) Participant observation enabled knowledge or evidence of the social world to be generated by observing, or participating in or experiencing “natural or real-life” settings or interactive situations.

This was important, especially because the information was direct, raw and undiluted. It was therefore possible for me to compare on-site what was said during interviews with the reality on the ground (Johnson & Christensen, 2014). This happened over the four-day period I spent at each school. Observations also made it possible to see facial and emotional expressions, as well as the body language of participants. It enabled me to gather information even on those issues that would not have come out during interviews. One disadvantage of observations is that the observer is not in control of proceedings.

Cohen *et al.* (2009) aver that observations are non-observationist by nature and as such, researchers cannot manipulate the situation or participants. Participants in this study were comfortable with the observer around, and especially that they were allowed to proceed with their business without any disturbance. At times, when a lot of information was flowing during observations, it became imperative to me to use shorthand writing to record as much information as possible. Since I had arranged for video recordings as and when necessary, it was during such times that events were videotaped and later transcribed as narratives of the said events and activities.

These were expanded into full texts whenever the opportunity arose at a later stage. When one is being observed, some behaviours are not authentic, and one would not be sure as to what would happen if participants were not observed. In this case, I focused on recording all observed activities. While observations are time consuming and costly, this technique was important in this study, as I was able to see some of the issues discussed during interviews in practice; hence some of them were presented in this study in the form of photos (Johnson & Christensen, 2014).

3.9.3 Document analysis

According to Johnson and Christensen (2014), documents are examples of secondary data that may be personal and also official. Various documents were collected from the school principals, but only those that were relevant and directly affected the study were analysed. Amongst the most critical items were the principals' personal timetable, daily itineraries, departmental policies, rules and regulations, documents relating to systems in the schools, school plans, and extra-curricular programmes. Other documents included letters to parents, minutes of meetings, internal circulars and memos. The selection of documents was influenced by the objectives of the study and the literature reviewed in chapter two. The following documents were key:

- Minutes of staff meetings and briefings
- School policies
- Departmental policies
- Matric results analyses
- School Development and Improvement Plans
- Vision and Mission statement

- Year Plan
- Duty roster
- School committees
- Academic Performance Improvement Plan
- Instructional timetable
- Learners and teachers' attendance registers

It was important for me to also see how these documents helped and enabled the principals to execute their leadership and managerial responsibilities, as demonstrated in the next chapter. Leedy and Ormrod (2005) assert that accessing relevant documents and deriving information constitute document analysis. One salient point critical to document review and analysis is that they also serve as evidence of activities taking place at the particular location.

I randomly requested these documents from participants without prior arrangement, and participants were honest enough to avail them. Where they were not readily available, the principals were able to explain. This was done to establish the existence of such documents and their authenticity. I was able to pick up and follow on some of the activities and actions taking place that they were indeed initially discussed and adopted at a meeting, also proving that such documents were indeed authentic. Using triangulation of the three data collection methods, interviews, observations, and documents and artefacts, I was able to determine the reality and authenticity of collected data.

3.10 POSITION OF THE RESEARCHER

According to Johnson and Christensen (2008), qualitative research is a naturalistic inquiry that involves studying real-world situations as they happen. The role of the researcher involves gathering data straight from participants. Bogdan and Biklen (2007) assert that when the researchers initiate a study, they must act as if they do not know anything, or know very little about participants, including their environment and the phenomenon under investigation. In this case, I spent four days on site with each participant in his or her own environment. During all this time, I was an observer most of the time, and only conducted interviews at the end of the school day. As a primary

research instrument, I was under immense pressure, since I had to stay vigilant and alert, as well as sensitive in order to gather as much data as possible, while at the same time remaining objective in my approach. This required discipline and efficient and accurate recording of all activities at the school, especially those that had more of an impact on the principal as a manager and leader of the school.

Bogdan and Biklen (2007) argue that qualitative research consists of “actual settings as the major source of data” and “the researcher being the key instrument”. This is emphasised by Johnson and Christensen (2008:34), where they define qualitative research as “a naturalistic inquiry, which involves studying real world situations as they happen”. In this study, I spent four days with each of the four selected school principals, observing them in practice, engaging with them on specific areas of their work as well as conducting interviews.

I deliberately adapted to the natural settings, cultures and environments of the participants in order to allow for freedom and honest expressions when explaining activities and answering questions; hence the naturalistic nature of this inquiry. It was therefore very easy for me to extend the stay in most of the schools due to the camaraderie that came about as a result of the harmonious relationships established. Further contact and interactions with participants continued beyond the initial four-day visits.

According to Lodico *et al.* (2006), it is incumbent upon the researcher to forge interactive relations with participants, and understand their social contexts and milieus. It was therefore quite easy for me to access the research sites, where I was well received. All principals understood the objectives of the study and were willing to participate. Nevertheless, my role was quite stressful, as it demanded full and unbiased attention at all times. This would not have been possible if there had been no trust between the participants and me (Castellan, 2010).

3.11 ETHICAL CONSIDERATIONS

McMillan and Schumacher (2006) are of the view that qualitative researchers have to consider ethical principles because of their research topic, personal interaction, emergent design and reciprocity with participants. It is on this basis that I had to

exercise high ethical principles as I went about gathering information. I was very careful not to interfere with the smooth running and operations of the school, but waited for opportune moments such as after meetings or discussions and during breaks and lunch, to ask questions on issues of interest to the study. According to Gomm (2008), research ethics are rules of morally good conduct for researchers. Specific ethical behaviour includes honesty, respect for the integrity of the individual, confidentiality of information and fairness. Therefore, the following served as a guide in respect of my ethical conduct as a researcher:

3.11.1 Confidentiality and anonymity

The rights and personal integrity of participants were protected, and all information was treated with the strictest confidentiality. Participants were guaranteed that all information they shared would be treated with the strictest confidentiality, and would not be availed to any person without their consent (Krathwohl, 2004). This is supported by Creswell's (2008) assertion that participants have the right to confidentiality of the information they provide.

3.11.2 Informed consent

Every participant was guaranteed the freedom of expression and self-determination. I ensured that consent was sought from participants through the letters that I sent to all of them before starting with investigations and visiting their schools. This was preceded by approval and letters of authority I received from the provincial offices of the Department of Education. With these permission letters, I was then able to visit the schools prior to the actual interviews and established rapport with the principals. I explained the purpose of the study in detail and my expectations from participants. Johnson and Christensen (2008) agree that informed consent describes the procedures where participants are given the freedom to participate or decline. This decision is normally precipitated by the information provided at the beginning of the study, where the researcher establishes rapport and explains the purpose of the study.

3.11.3 Access and acceptance

This is the time when the researcher makes contact with the participants in order to establish rapport and relationship. During this meeting I provided all participants with

information regarding the envisaged study and they were offered a choice to continue or decline. It was easy for me to reach the chosen schools, since I am familiar with the areas in which schools are located. In the Free State, I initially contacted the circuit manager concerned who had already organised a circuit meeting of all principals in his circuit. I was then invited to present the study and its purpose to the principals, explaining the type of sample I needed and the reasons thereof. Participants were happy to participate in the study, especially that it was conducted by one of their own, who is also a school principal.

Johnson and Christensen (2008) regard the treatment of participants in a very serious light, because they believe research that involves human beings has the potential of getting out of hand; thus doing more harm than good. The researcher needs to provide information and alert the participants of the interests of the study and the agreement between the parties involved in the research (Bogdan & Biklen, 2007). Participants were treated with respect and great humility, which they appreciated. The researcher established rapport with all participants during the pre-interview visits he conducted, and all participants voluntarily signed the acceptance letters to take part in the study.

3.12 DATA ANALYSIS

Data analysis is the process of bringing order, structure and interpretation to the massive data collected (Marshall & Rossman, 1999). According to Bogdan and Biklen (2007), data analysis is described as the process of strategically compiling and organising interview recordings, field notes and other relevant documents that were acquired by the investigator in order to compile the findings. Mazibuko (2007) regards data analysis as a dynamic and creative process through which the researcher continuously tries to gain a deeper understanding of the phenomenon under study and to refine the interpretation of data on a continuous basis. In analysing the data, I applied an inductive content analysis approach to uncover overarching themes that emerged from the narratives of the four participants, together with field notes from observations and documents analysis.

I followed data analysis steps recommended by Creswell (2007:60-62), which include (1) Data collection, which starts with organising and preparing data. This also involved transcriptions of data from observations, interviews, and documents availed, as well

as field notes, into meaningful sentences which resulted into text that is easy to read; (2) Data entry and storage – where all data were read in order to derive sense and reflection on its meaning. This involved organising ideas and concepts that were identified; (3) Segmenting, coding and establishing categories – where analysis of data actually began. Meanings, ideas, and concepts identified were coded and categorised into meaningful units. (4) Identifying relationships between collected data through coding in order to establish themes – the coded data fell into patterns that were organised into common themes that emerged.

Data that were unimportant to the purpose of the study were removed and put aside, thus cleaning the data to be in line with the study objectives. (5) Construction of diagrams, tables, matrices and graphs as well as pictures to convey relevant findings – where necessary, I constructed diagrams and tables, and in some instances I used photos and drew graphs to enhance the presentation of data, which resulted into meaningful paragraphs and sections. (6) Coordinating and validating the results – I used triangulation to check the validity and authenticity of my data, and this ensured that the findings of the study were credible.

According to Kombo and Tromp (2009), data analysis includes examining what information was collected and deriving inferences and making deductions. It also involves exposing underlying facts, selecting important parts, detecting and testing any conflicting points. During school visits and as data were compiled, analysis took place simultaneously. This means data were processed as soon as it had been received, which assisted me to realise in time if further information was required in order to fill in the gaps. Analysis involved data being organised into meaningful units, as presented by participants (Cohen *et al.*, 2009). During the analysis, data were captured, coded and analysed.

This enquiry was based on the narratives obtained from school principals during interviews. Following the formalist perspective approach, I visited the research sites with pre-set questions that were meant to gather as much data as possible in line with the purpose of the study. Audio and visual recordings that were obtained from interviews and other narratives were first transcribed, thereby presenting a verbatim account of the participants' words.

Each participant's narratives went through a sifting process, where only the most important and relevant parts of their stories were captured. Then these, together with notes and documents obtained from schools as well as information gathered during informal discussions, were put through a process of segmentation. This was followed by coding, which resulted in meanings being derived. Before I could derive meaning from data collected, all data had to be classified and categorised, by putting those that were the same together. Classified data were arranged into codes, which were grouped into the themes that emerged as a result of classification and codification processes.

According to Graneheim, Lindgren and Lundman (2017), a theme in research is a unifying 'red thread' running through several categories that bring meaning to a recurrent topic or experiences and its various manifestations. On the other hand, Morse (2008) describes a theme as a meaningful 'essence' that runs through the data, similar to motif in an opera, sometimes in the background and sometimes in the foreground (Graneheim *et al.*, 2017). The following themes emerged from data analysis in this study:

- Policies that guide the work of principals and how they make sense of them.
- Existing structures and available resources.
- Day-to-day practices to achieve a balance.

This analysis also involved the interpretation and analysis of the meanings and actions of the principals. On completion of data analysis, I was able to carefully generate the findings based on facts established in all the cases under study. According to Bogdan and Biklen (2007), data interpretation involves the generation of ideas based on facts established.

3.13 VALIDITY

Most and commonly used types of validity in qualitative research include descriptive validity, interpretive validity, theoretical validity, and internal and external validity. This study also employed the interpretivist approach and therefore interpretive validity came in as a portrayal of the meaning attached by participants to the problem being investigated. Johnson and Christensen (2014) define it as the extent to which the

research participants' viewpoint, thoughts, feelings, intentions and experiences are captured correctly by the researcher and presented in the study.

External validity is the extent to which the results of a study can be generalised to the wider population, cases or situations (Cohen & Manion, 2002). This is also emphasised by Briggs and Coleman (2007), namely that the external validity relates to the extent that findings may be generalised to the wider population that the sample represents or to other similar settings.

Neuman (2000) asserts that in order to establish credibility and authenticity of the findings, validity is essential. This is emphasised by McMillan and Schumacher (2006:324) in their description of validity as, "the degree to which the explanations of the phenomena match the realities of the world". Briggs and Coleman (2007) argue that validity is used to judge whether the research or study adequately and accurately explains the problem that it is supposed to explain.

It is therefore critically important that validity forms the basis of all processes of research. In this regard, I was able to ensure validity by spending time in schools, even after collecting data, to verify the data collected. The fact that I also revealed challenges experienced by the participants and how they were resolved, and the way participants conducted themselves, will also enable readers to interpret the data. After all data collected had been neatly transcribed and organised properly, I went back to the participants who were afforded the time to scrutinize it and make comments where they felt they were not properly captured. After the transcripts had been sent to all participants for member checking, in order to ascertain the credibility and reliability, and also to confirm the accuracy of all the facts as determined by Born and Preston (2016), corrections were made where necessary. The feedback received from the participants enabled me to strengthen the factual authenticity of collected data.

According to Creswell (2003), validation of the findings of a study occurs throughout the different stages of the research. Validation is intended to ensure that the findings are genuine and that they are not overtly influenced by what the research intended to find. Creswell (2003), and Johnson and Christensen (2008:36) suggest the following strategies that were thoroughly followed in this study, and which also gave credence to the validity and the accuracy of the research findings: (1) Triangulation of different

sources of data; (2) Using member checking to establish the accuracy of the qualitative findings; (3) Using thick and factually rich descriptions to present findings; (4) Clarifying the bias that the researcher brings to the study; (5) Presenting negative or discrepant information that runs counter to the themes; (6) Spending an extended period in the field of study with participants in order to develop an in-depth understanding of the problem under review; (7) Using debriefing to enhance the accuracy of the account; (8) Language of participants and verbatim accounts were used; and (9) Low-influence descriptors, including concrete, precise descriptions from field notes and interview elaborations. All these steps were followed in this chapter as proof of the trustworthiness of the study (Graneheim *et al.*, 2017).

3.14 LIMITATIONS

The researcher indicated earlier in this chapter that narrative studies have a tendency towards biasness. It was difficult for the researcher to restrain from participating in the daily activities since he is a principal himself. Objectivity had to supersede any form of biasness at all times. This meant that the researcher had to be alert at all times, and not engage with participants even if there is a strong temptation to do so.

3.15 CHAPTER SUMMARY

In this chapter, I described research methodology and design as well as instruments employed to gather information for the study on principals' narratives on balancing leadership, management and instruction in South African schools. I outlined the methodological and paradigmatic frameworks that directed the study. A declaration and justification of the researcher's stance and role were also outlined. I also explained the reduction of the size of the sample, where the number of participants was reduced from six to four.

A breakdown of the characteristics, strengths and shortcomings of the observations, interviews, and analysis of documents were elaborated on, ending with ethical considerations to ensure validity and reliability. The chapter also explained the study design at length, outlining the choice of the sample and ending with issues of validity and reliability. I also went in detail, to explain how data was analysed, explaining the steps followed, as well as the paradigm used.

It was also important to explain the motivation to choose qualitative narrative case study as a vehicle to achieve the set goals of the study. In this inquiry, I then outlined the way qualitative methods were used to generate rich background narratives about the way principals understand, interpret and experience their daily duties in their schools. This chapter further explained the multimedia used in data sources such as interviews, observations and document analysis, as well as how they were actualised. The next chapter will focus on data presentation, analysis and discussion.

CHAPTER 4:

DATA PRESENTATION, ANALYSIS AND DISCUSSION

4.1 INTRODUCTION

This chapter outlines the narratives of the four school principals and draws on data from document analysis, observations and in-depth interviews to answer the major research question on how principals go about their dual mandate as instructional leaders and school managers in South Africa. The analysis uses distributed leadership and instructional leadership as the anchors and lenses through which the data are examined and interpreted. In order to respond adequately to the main research question, the following sub-questions were used to structure the narratives:

- What are the policies that guide the work of school principals as school managers and instructional leaders?
- What structures and resources do school principals rely on in order to carry out these policy dictates in leading and managing their schools?
- How do principals go about their day-to-day practice of leadership and management of schools, and how is the balance achieved, if at all?
- How can the success of some school principals regarding the challenge of balancing management and instructional leadership at their schools be understood and/or explained?

While the study is based on the purposefully selected school principals who were chosen from three high-performing districts in two provinces of the Republic of South Africa, gender was not necessarily a consideration. However, many scholars and studies made comments on the bias of leadership towards males, especially at secondary schools. These scholars maintain that with the existence of certain stereotypes, males are considered more favourable than females for leadership roles (Krüger, Van Eck & Vermeulen, 2005). They further argue that in the workplace, and specifically in public schools, the stereotypical frames of effective leaders have worked against aspiring female leaders.

The fact that only one of the principals who met the sampling criteria is female could be understood in that context of a system that is uneven and continues to

disproportionately favour men for school leadership positions.

The choice of participants was based purely on performance of their schools. The principals were required to have been in their positions for a minimum of three years and, most importantly, have achieved success at their schools with respect to Grade 12 results. In choosing these participants I was also attracted by the fact that two of the three districts sampled have consistently been doing well in terms of national rankings, while one has been struggling. And the participants themselves are distinguished leaders who have been principals for more than five years, and whose schools have somewhat been the shining stars and beacons of hope in their districts.

This section begins with the presentation and analysis of the policies and then structures that are meant to empower and support school principals to deal with the demands of their work. This is followed by the narratives of participants starting with biographical background of the participants and their schools, in order to enable a better understanding of the context and in response to the study objectives as outlined in the first chapter of this research.

Next follows a summary of themes, sub-themes and categories.

Table 4.1: Summary of themes

No	RESEARCH QUESTIONS	THEMES	SUB THEMES	CATEGORIES
4.1.1	What are the policies that guide the work of school principals in South African schools and how do principals make sense of these policies?	Policies that guide the work of principals and how they make sense of them	Making sense of policies	School policies
				Departmental policies
4.1.2	What structures and resources do principals rely on to carry out these policy guidelines in their dual mandate of management and instructional leadership in schools?	Existing Structures and Available Resources	Existing structures Available resources	- Managerial structures - Instructional structures - Managerial resources - Instructional resources
4.1.3	How do principals go about their day-to-day practice of leadership and management of schools and how is the balance achieved, if at all?	Day-to-day practice to achieve balance	Day-to-day activities	- Instructional leadership - Parents and community - Monitoring and support - Challenges - Opportunities and success drivers
			Achieving a balance	Extended hours

4.2 POLICIES AND LEGISLATIVE FRAMEWORK AFFECTING PRINCIPALS' WORK

The work of a school principal is informed by numerous departmental and school policies that enable effective management and instructional leadership at a school. These policies are meant to inform, guide and empower school principals in their duties. For the purpose of this study, the focus is on instructional leadership policies

and management policies; hence, I found the following legislative framework relevant and useful for principals in their quest to strike a balance in their dual mandate as instructional leaders and school managers. In the section below, I first discuss the relevant policies before engaging with how they shape the day-to-day work of the principals in response to research question 3 later.

4.2.1 The Constitution of the Republic of South Africa (RSA, 1996)

The *Constitution of the Republic of South Africa* (RSA, Act 108 of 1996) presents a special challenge to everyone, by dictating that basic education is a fundamental right which must be provided for all South Africans. This is enshrined in Section 29(1), where it provides “that everyone has the right to a basic education, including adult basic education ...” This fundamental right to basic education is further developed in the Constitution (RSA, 1996b) in Section 9(2), which commits the state to the achievement of quality, and Sections 9(3), (4) and (5), which commit the state to non-discrimination. All these clauses are particularly important for the protection of all learners in South Africa.

The government’s obligation to provide basic education to all learners and its commitment to the central principles of the Constitution are also guided by the recognition that a new unified education and training system must be based on equity, on redressing past imbalances, and on progressive raising and uplifting of the quality of education and training. The Constitution inspires common citizenship based on the values of human dignity, the achievement of equality and the advancement of human rights and freedom (Section 1a).

4.2.2 National Curriculum Statement (NCS)

The National Curriculum Statement (DBE, 2019) is made up of three parts: the Curriculum and Assessment Policy Statement (CAPS); Policy pertaining to the programme and promotion requirements of the NCS Grades R–12; and the National Protocol for Assessment Grades R–12. The general aims of the NCS Grades R–12 are to give expression to the knowledge, skills and values worth learning in South African schools. The curriculum aims to drive skills acquisition by learners and application of knowledge and skills, thus promoting knowledge in local contexts while also aligned to global trends.

This curriculum is set to equip learners, irrespective of their socio-economic background, race, gender, physical ability or intellectual ability, with the knowledge, skills and values necessary for self-fulfilment, and meaningful participation in society as citizens of a free country. It also seeks to provide access to higher education while also facilitating the transition of learners from education institutions to the workplace, by providing employers with sufficient profiles learners' competences.

The NCS Grades R–12 is based on the following principles derived from the Constitution of the Republic of South Africa, which was discussed above: social transformation, active and critical learning, high knowledge and high skills, progression, human rights, inclusivity, environmental and social justice, indigenous knowledge system, and credibility, equality and efficiency (Education, 2019).

4.2.3 National Education Policy Act (NEPA) (Act 27 of 1996)

This Act promulgates Norms and Standards for educators. The term 'educator', according to this policy statement, applies to all those who teach or educate other persons or who provide professional services at any public school, further education and training institution or departmental office. The term includes educators in the classroom, heads of departments, deputy principals, principals, education development officers, district and regional managers and systems managers (NEPA, 1996).

Norms and Standards for Educators

The NEPA (RSA, 1996a) describes the roles, their associated set of applied competences (norms) and qualifications (standards) for the development of educators. These norms and standards emphasise applied competence and its associated criteria. Applied competence is made up of three interconnected criteria, which are (RSA, 1996a:A-44):

- Practical competence:
- Foundational competence
- Reflexive competence

Applied competence is therefore the ability to integrate the discrete competences that constitute each of the seven educator roles, which should be assessed in an integrated and applied manner. The following are the educator roles (RSA 1996a:A-47):

Learning mediator – the educator will mediate learning in a manner which is sensitive to the diverse needs of learners, including learners with barriers to learning; construct environments that are appropriately contextualised and inspirational; communicate effectively showing recognition of and respect for the differences of others.

Interpreter and designer of learning programmes and material – the educator will understand and interpret provided learning programmes, design original learning programmes, identify the requirements for a specific context of learning and select and prepare suitable textual and visual resources for learning.

Leader, administrator and manager – the educator will make decisions appropriate to the level, manage learning in the classroom, carry out classroom administrative duties efficiently and participate in school decision-making structures.

Scholar, researcher and lifelong learner – the educator will practise ongoing personal academic, occupational and professional growth through pursuing reflective study and research in their learning area, broader professional and educational matters, and in other related fields.

Community, citizenship and pastoral role – the educator will practice and produce a critical, committed and ethical attitude towards developing a sense of respect and responsibility towards others.

Assessor – the educator will understand that assessment is an essential feature of the teaching and learning process and know how to integrate it into this process.

Learning area/subject/discipline/phase specialist – the educator will be grounded in the knowledge, skills, values, principles, methods, and procedures relevant to the discipline, subject, learning area, phase of study, or professional or occupational practice.

4.2.4 Employment of Educators Act (Act 76 of 1998)

Educator workload: this Act stipulates that all educators should be at school during a formal day and spend a minimum of seven hours each day. Exceptions can only be made by the principal after evaluating circumstances. The principal is tasked with the

allocation of duties per post level, specifying and scheduling teaching time, and drawing up a teaching timetable in consultation with the teaching staff. The Act specifically prescribes:

Each post level within a school has different duties and responsibilities, encompassing the core duties such as:

During the formal school day – Scheduling teaching time, extra and co-curricular duties, pastoral duties (ground, detention, scholar patrol, etc), administration, supervisory and management functions, professional duties (meetings, workshops, seminars, conferences, etc), and planning, preparation and valuation.

Outside the formal school day – Planning, preparation and evaluation, extra and co-curricular duties, professional duties, and professional development.

Furthermore, there should be an equitable distribution of workload between the various post levels and within a post level, to ensure that one or two of the levels or an educator is not over-burdened. The expectation being that every educator must be able to account for 1 800 actual working hours per annum (RSA, 1998:C-63).

Apart from normal teaching duties, educators are expected to carry out duties specified in Section 3.1(b). These include relief teaching; extra and co-curricular duties; pastoral care duties; administration; supervision and management functions; professional duties; and planning, preparation; and evaluation. All these duties should be carried out during the formal school day.

In addition, educators also have duties outside the formal school day. These include planning, preparation and evaluation, extra- and co-curricular duties, professional duties (including meetings, workshops, seminars, conferences, and others), and professional development training programmes. Over and above all these, educators may be required to attend professional development training up to 80 hours outside the formal school day or during school vacations (RSA, 1998:C-62-63).

4.2.5 The South African Schools Act (Act 84 of 1996)

The *South African Schools Act* (SASA, 1996b) came into effect on 1 January 1997 with the main objective of providing for a uniform system for the organisation,

governance and funding of schools. The Act prescribes the scope of the school as learning programmes from Grade R through to Grade 12. Section 3 of this Act provides for compulsory attendance of learners at school between the ages of 7 and 15 (or after completing Grade 9). This phase is known as the compulsory General Education phase. The responsibility to fund these institutions of learning is imposed on the state as enshrined in the *Constitution of the Republic of South Africa* (RSA, 1996c), which provides:

The State must fund public schools from public revenue on an equitable basis in order to ensure the proper exercise of the rights of learners to education and the redress of past inequalities in educational provision (RSA, 1996c:Section 34(1)).

The roles and responsibilities of a school principal are enshrined in Section 16A of the *South African Schools Act* (RSA, 1996a). This section outlines the difference between the management and professional leadership of the school by the principal and the governance of the school by the SGB. The school governing body of a public school has a number of functions mandated by this Act. These include, among others, promoting the best interests of the school and striving to ensure its development through the provision of quality education for all learners at the school.

The SGB must adopt a Constitution that will guide their activities, develop the mission and vision statement of the school, support the principal, educators and other staff of the school in the performance of their professional functions, determine times of the school day in line with applicable conditions of employment of all staff at the school, and administer and control the school's property, and buildings and grounds occupied by the school, including school hostels, if applicable (RSA, 1996b:B12-13).

The Act also allows for the SGBs to apply to the Head of Department in writing to be allocated additional functions which may include:

- (a) To maintain and improve the school's property, and buildings and grounds occupied by the school, including school hostels, if applicable.
- (b) To determine the extra-mural curriculum of the school and the choice of subject options in terms of provincial curriculum policy.
- (c) To purchase textbooks, educational materials or equipment for the school.
- (d) To pay for services to the school.

- (e) To provide an adult basic education and training class or centre subject to any applicable law.
- (f) Any other functions consistent with this Act and any applicable provincial law.

According to Section 16 of SASA (RSA, 1996a), the SGB stands in a position of trust towards the school, and the governance of the school is vested in its governing body, which may perform only such functions and obligations and exercise only such rights as prescribed by the Act. It is of critical importance to note that, according to the Act, the professional management of a public school must be undertaken by the principal under the authority of the head of department (RSA, 1996b:B-11).

SASA (RSA, 1996b) enables school principals and governing bodies to perform their duties effectively, and outlines a thin line between the management and governance of schools. However, it is important, for the benefit of all stakeholders of the schools, that all activities are directed at creating conditions suitable for instructional leadership to prosper, resulting in learner achievement, which is the key purpose of education. Participants' demonstration of the use and effectiveness of these policies is aptly discussed in the narratives derived from the interviews and observation at the different schools.

4.2.6 Policy on Access to Schools – Learner attendance (RSA, 1996: B-66)

The purpose of this policy to promote punctual and regular learner attendance at public schools, and to provide public schools and provincial education departments with standard procedures for recording, managing and monitoring learner attendance. The policy applies to all public schools and is aimed at addressing certain challenges affecting attendance of learners at public schools, such as learners staying away from school due to abject poverty, inability of parents to pay school fees or buy school uniforms, lack of transport to school, chronic illness of parents or learners, poor nutrition or hunger, unstable or dysfunctional family life, and gang and public violence.

Various relevant official programmes are introduced in schools to support school principals and districts in alleviating the worst effects of chronic poverty. These include the extension of the child support grant to impoverished children aged 16 to 18, the implementation of HIV/Aids programmes, National School Nutrition Programmes and

a No-fee school policy. The policy asserts that a school that successfully curbs absence without valid reasons will most likely improve learner retention and performance.

This is the critical driving force that most of the participants in this study have mentioned. All the principals interviewed cited learner late coming and absence as major hindrances towards their smooth practice of instructional leadership and attainment of set goals. This policy also avers that regular school attendance is a powerful deterrent of teenage pregnancies and HIV infections, which are some of the challenges school principals face on a daily basis.

Importance of learner attendance policy

A daily record of learner attendance enables a school to monitor learners' absence and take appropriate follow-up action with both parents and learners. Quarterly returns of learner absence enable district offices to track learner attendance trends at schools and to respond appropriately. Records of learner attendance may be required for legal purposes. It is therefore essential that a school maintains such records accurately. The principal and staff of a school act *in loco parentis* (in place of a parent) for a learner at their school. They therefore have a duty of care towards each learner who is recorded as present. In the event that a legal action was instituted against the school as a result of a mishap to a learner, the accuracy of the learner attendance record could be an important issue before the court. It is therefore important, as has been demonstrated by some of the participants in this study, that accurate record keeping forms part of a principal's priority.

4.2.7 The Integrated Quality Management System (IQMS)

The IQMS is an integrated quality management system that is made up of three programmes, aimed at promoting and monitoring performance of the education system (DoE, 2003). The three programmes are:

- Development Appraisal
- Performance Measurement, and
- Whole School Evaluation

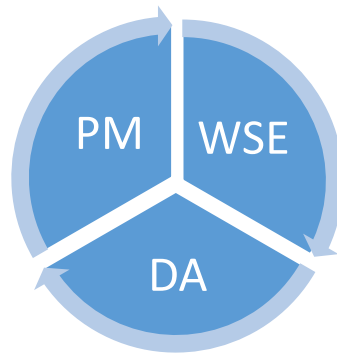


Figure 4.1: Diagram depicting the interrelatedness of the three programmes

The primary purpose of Developmental Appraisal (DA) is to appraise individual educators in a transparent manner with a view to determining areas of strength and weakness, and to draw up programmes for individual development, on the other hand, the purpose of Performance Measurement (PM) is to evaluate individual teachers for salary progression, grade progression, affirmation of appointments and rewards and incentives.

The purpose of Whole School Evaluation (WSE) is to evaluate the overall effectiveness of a school as well as the quality of teaching and learning. These three programmes are implemented in an integrated way in order to ensure optimal effectiveness and co-ordination of the various programmes. It is therefore incumbent upon school principals to ensure that the IQMS is fully implemented in order to attain all its desired objectives within their schools. All participants in this study described the ways they make use of existing structures in their schools to promote IQMS. A structure like the School Development Team (SDT), which is headed by the IQMS coordinator, enables the principal to comply with the requisites of this policy as shown in the narratives of the participants in this study.

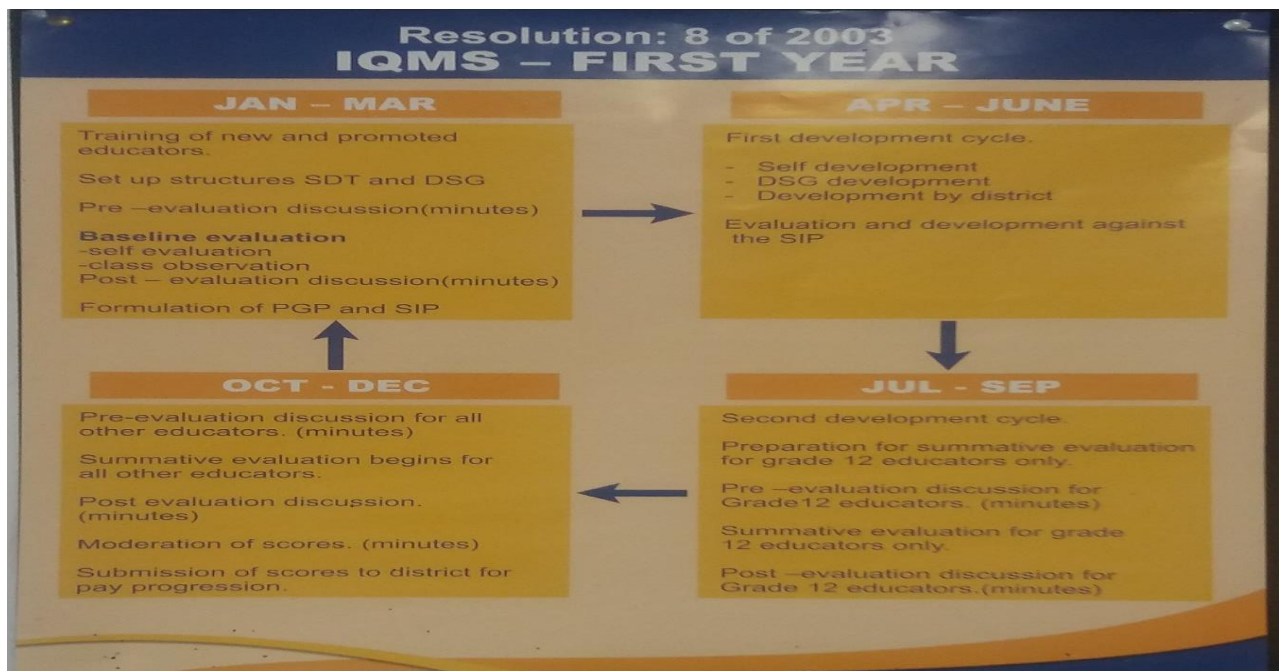


Figure 4.2: The stages (cycle) of IQMS implementation (Photo by TJ Tshabalala)

The above presents a guide on the four stages of IQMS implementation. This also contributes to proper planning and provides guidance on what should be accomplished within a certain period of time. This poster was displayed at one of the participating schools' notice boards.

4.2.8 Labour Relations Act (Act no 66 of 1995)

The Act is aimed at advancing economic development, social justice, labour peace and democratisation of the workplace, by fulfilling the primary objectives of this Act (ELRC, 1997:G-H).

The primary objectives

The Labour Relations Act's primary objectives are to:

- 1 Give effect to and regulate the fundamental rights conferred by section 27 of the *Constitution of the Republic of South Africa* (RSA, 1996c).
- 2 Give effect to obligations incurred by the Republic as a member state of the International Labour Organisation.
- 3 Provide a framework within which employees and their trade unions, employers and employers' organisations can collectively bargain to

determine wages, terms and conditions of employment and other matters of mutual interest, and also to formulate industrial policy.

4 Promote:

- a. Orderly collective bargaining
- b. Collective bargaining at sectorial level
- c. Employee participation in decision making in the workplace
- d. The effective resolution of labour disputes.

Protection of rights

This Act guarantees protection for the rights of all employees and employers, trade unions and employers' organisations. It seeks to regulate relationships such that all parties are able to participate and perform their roles freely and responsibly. Labour peace is always a priority for all managers, and schools are not an exception. In order for school principals to function effectively and achieve their goals, they need a special environment that is receptive and adaptable to the daily demands of their work. This Act provides guidelines on disciplinary processes that principals can follow in the event of dealing with misconduct cases in their schools (RSA, 1995:G12–13).

Discussion

The policies discussed above are but a few of the major legislative frameworks that guide school principals in their efforts to make the best of their day-to-day functions and responsibilities. I specifically emphasised these policies, based on the purpose of the study, which is to investigate how school principals go about their dual mandate as instructional leaders and managers of schools in South Africa. The policies are spread around various areas of operation in a school, and include among other things labour peace, curriculum mediation assessment and promotion requirements, norms and standards for educators, school governance, teacher development, and learner attendance.

The analysis indicates inconsistencies among schools with regard to policy implementation. In working with the four school principals from different districts and provinces, I was able to observe and learn how each of them invoked various policies deal with different situations in their daily operations, as they seek to achieve a balance. Although the schools that came from the same district and province had some

similarities, they also showed differences in the approach and implementation of some of the policies.

One other finding on the application and implementation of policies in schools is that in spite of their good intentions, some of the policies made it difficult for school principals to implement accordingly. Examples of such inconsistencies include principal Mathapelo on learner pregnancy, pass requirements by Mosiuwa, Sonny and Mathapelo, and Sonny on the implementation of the MEO. The impact of these policies is discussed further in the next section, where I present structures and resources that principals rely on to lead and manage their schools successfully.

4.3 STRUCTURES THAT PROMOTE INSTRUCTIONAL LEADERSHIP IN A SCHOOL

The Department of Basic education of South Africa has mandated schools to establish structures that will enable the functionality of schools and achievement of the education objectives. This came about as a result of the devolution of powers to schools with the main objective of empowering them to manage themselves as opposed to the old order where there was a top down management approach. These structures are therefore common at all public ordinary schools in South Africa. The following are some of those structures.

4.3.1 School Governing Body (SGB)

The *South African Schools Act* (SASA, 1996) outlines each school as a juristic entity and mandates all SGBs to govern their schools. The Act sets out all procedures and processes for the establishment of SGBs, and its membership consists of democratically elected parents, teachers, non-teaching staff and learners (at secondary schools). The School Governing Body (SGB) is therefore a statutory body, elected democratically by relevant stakeholders at each school.

The responsibilities associated with the SGB are strictly governance, and to provide support to the principal. Section 16 of the *South African Schools Act* (Act 84 of 1996) explains the position of a school governing body as follows:

Subject to this Act, the governance of every public school is vested in its governing body and it may perform only such functions and obligations and exercise only such rights as prescribed by the Act. The SGB stands in a position of trust towards the school, and subject to this Act and any other applicable provincial law, the professional management of a public school must be undertaken by the principal under the authority of the Head of Department (RSA, 1996b).

They are responsible for, inter alia, ensuring that the school's infrastructure is maintained, cleanliness, provision of resources including the Teaching and Learning Support material (LTSM), and fundraising, to name a few.

Section 20 of SASA (RSA, 1996b) outlines the roles and functions of the SGBs, which are mainly to promote the best interests of the school and striving to ensure its development through the provision of quality education for all learners at the school. SASA provides powers to SGBs and includes additional powers to, among others: determine the school's admission policies; language policy of the school; fees to be charged at schools; determine the choice of subject options and extra-curricular activities of the school; and formulate the code of conduct for learners.

4.3.2 The School Management Team (SMT)

The School Management Team (SMT) is made up of the principal, up to two deputy principals, and several heads of departments (HODs), depending on the size of the school. All these are promotional positions, where incumbents are appointed through the publication of an open vacancy list (Circular), and recommended based on their competences. This structure is responsible for the overall management of the school. School principals effectively rely on the SMT to spread their wings across all facets and scope of work. Head of departments are essentially responsible for curriculum delivery in all subjects available at the school. They are experts in their own field and subjects, while the deputy principals have to give account to the principal on the performance of the HODs.

This relates favourably with Sammons *et al.*'s (1997) assertion that the task of instructional leadership implementation would best be placed in the capable hands of heads of departments at schools. These studies emphasise that for curriculum improvement initiatives to succeed, adequate opportunities will have to be created in

order to promote and encourage collegial relations among teachers. The HODs interact regularly with educators in their different departments on instructional leadership, assisting them with challenges they face on daily basis, and developing their capacity to deliver as expected.

4.3.3 Representative Council for Learners (RCL)

The advent of democracy in South Africa in 1994 brought about numerous changes in the management of secondary schools in particular. The right of learners to participate in and contribute to decision making as stakeholders in their own education brought about a new dimension in schools. Management, governance and decision-making were decentralised to the level of the school, instead of all decisions being taken by provincial and national departments of education (DoE, 2003). The new political dispensation allowed for the establishment and recognition of a structure called the Representative Council for Learners (RCL), mandated by the *South African Schools Act* (RSA, 1996b), as amended. The Act stipulates that all public schools in South Africa with learners from Grades 8 to 12 are mandated to establish RCLs, and these shall be the only recognised structures representing learners. The Act also makes provision for learners from this structure to represent learners in the School Governing Body (SGB).

4.3.4 School-based Support Team (SBST)

The other structures that the principals rely on are the School-based Support Team (SBST) and School Assessment Team (SAT). These are statutory structures that must be established in all schools to deal with support and assessment, respectively (DBE, 2014). Membership of these teams include SMT members and educators in post level one who are elected to the structure in a formal staff meeting. The School-based Support Team (SBST), attends to all problems related to learners' learning and wellbeing. They receive learner information from the School Assessment Team (SAT) and other staff members, relating to various challenges faced by learners. The SBST then has to devise means to resolve those challenges and assist the learners.

Their scope of responsibility stretches across a variety of problems encountered including learners with special educational needs, such as slow learners; child headed families; poverty affecting learners; and abuse, including substance abuse, truancy,

and many others. This team relies heavily on the cooperation and support of all stakeholders within and outside the school. These include the National Department of Health, Ministry of Social Justice and Empowerment, the South African Police Services (SAPS), South Africa's Formal Business Sector and different Non-Governmental Organisations (NGOs). The principal is a member of this team even though he does not occupy a leadership position.

4.3.5 School Assessment Team (SAT)

The School Assessment Team (SAT) is one major structure in the school and is responsible for coordination of all assessment programmes in all subjects offered by the school. This team has to ensure that they draw up an annual assessment plan, which should be followed by the whole school, including planning for examinations. They also analyse learner performance and report to all stakeholders. From the analysis of results they identify learners who do not perform well and report them to the SBST for intervention. The annual assessment programme includes a selection of internal examiners, collating all question papers and ensuring that they are standardised and well edited.

The coordinator of this team is normally the deputy principal, who then reports to the school principal. The principal receives reports from these structures and intervenes wherever necessary. These reports enable the principal to plan and develop enrichment programmes for learners who are not doing well in different subjects. Mosiuwa shares this information with all stakeholders, especially parents, whom he encourages to assist their children with schoolwork.

4.3.6 School Committees

Activities taking place at a school are vast and require a lot of planning in order to do justice to all of them. School principals are strategically placed to innovatively apply their managerial skills to gainfully engage all their staff in all these activities. School committees can benefit the schools in various ways, and are set to harness the efficiency and effectiveness of systems within the schools. There are many committees that can be established in a school to achieve specific goals, depending on the school's needs. For the purpose of this study focus will be only on those committees that enhance instructional leadership and promote effective management of the school.

One most critical committee in a school is the school development committee or team (SDT). This committee is responsible for all development programmes of the school. It comprises members from the staff and the SGB and may also include RCL members at secondary schools. Development programmes may vary, ranging from human resource development, physical resourcing, as well as academic development and improvement. Members of this team are democratically elected based on their skills and competencies. The school principals are also members of this team, although they do not occupy any leadership positions.

The *South African Schools Act* (RSA, 1996b) mandates every school to establish a safety committee, which looks after the safety of all the learners in the school. This committee has to develop programmes that highlight the importance of and create conditions suitable for a safe environment conducive to effective instructional leadership. It is followed by the sports and culture committee, which looks after the physical development and recreational activities of the school, promoting a healthy mind in a healthy body. Other committees, like the subject committees, are strategically poised to effect delivery while also providing support to teachers in various school subjects.

Discussion

The discussions above present a picture of how dynamic schools are, and how important each of the components of this dynamic system are for it to function effectively. Education departments have realised the need to formalise these structures and therefore mobilised schools to establish and make use of them. However, the use of these structures did not prevail equally at all schools visited. I realised that their effectiveness depended entirely on the type of leadership a school has. It was not surprising to find that all principals mentioned the same structures they employed in their day-to-day functioning, but the way these structures operate was different.

Their roles were not necessarily the same. For instance, at two schools, principals mentioned the role played by SGB members and highlighted some of their activities at their schools, while others simply mentioned their involvement in policy formulation only. In the next sections of this chapter I present four cases of school principals

making use of the policies and structures discussed above, also focusing specifically on what I observed and what each principal discussed during the four days of my visit to their schools.

4.4 BIOGRAPHICAL BACKGROUND AND NARRATIVES

Table 4.2 below presents summarised data on each of the selected schools, including learners' enrolment, number of educators, number of deputy principals, and experience of the principals in years both as educators and as principals and the size of the school in terms of the number of classrooms. The first two schools are located in the Free State's Fezile Dhabu district, while the next two are from the Gauteng Province's Gauteng West and Sedibeng West districts, respectively. The schools are referred to by using the principals' names, and the participants are themselves given pseudonyms in order to hide their identities.

Table 4.2: Participants' profiles and background information

School names	Names of Principals	No. of Learners	No. of Educators	No. of Deputy Principals	Principals' experience in education	Experience as Principal	No. of years at current school	No. of classrooms
Mosiuwa High	Mosiuwa	1526	53	02	30	17	30	34
Mathapelo High	Mathapelo	1014	35	02	17	06	06	26
Gomolemo High	Gomolemo	1215	42	01	19	07	07	26
Sonny High	Sonny	823	26	02	33	09	09	26

As seen in Table 4.2, Mosiuwa High appears to be the biggest of them all, with an enrolment figure of 1 526 learners, and 53 educators, it is followed by Gomolemo High with 1 215 learners and 42 educators. A stark difference between the two schools is that the first one is an older school, with aging infrastructure, while Gomolemo High is relatively new, with a beautiful and modern infrastructure.

Both the principals of Mosiuwa high and Gomolemo High alluded to the fact that high learner numbers pose serious disciplinary and maintenance challenges, which tend to

weigh heavily on their limited budgets. Other than the pressure of numbers, it appears the two principals, do not differ much from the rest of their colleagues in terms of their mandate as principals. From Table 1, it is also evident that Gomolemo High School has only one deputy principal, compared to the others. The reason for this is that the school is still growing and posts are allocated based on learner numbers (growth), as he explained during interviews.

4.4.1 The story of Mr Mosiuwa

4.4.1.1 Presenting Mr Mosiuwa – “Managing by walking-about”

As a principal you need to have a bird’s eye view of your school, you can’t just be nailed to your chair in the principal’s office.

The first school I visited is one of the biggest and oldest secondary schools in the Fezile Dhabu District, located in the biggest township in the Northern Free State. The school has consistently done well in the Grade 12 results over the past number of years. The current principal, Mr Mosiuwa, is the oldest teacher at the school in terms of age and also the most experienced. The principal is professionally qualified, with a Secondary Teacher’s Diploma, a Further Diploma, and a Bachelor’s degree in Education. This principal has seen the school through various periods of highs and lows under different leadership since he joined as an entry-level teacher, and moved up the ranks until he became the principal of the same school. He has amassed a lot of experience along the way, which comes in handy for him in his current leadership role.

Mr Mosiuwa was born in Kroonstad in the Northern Free State and his teaching career started in the Eastern Free State town of Bethlehem in 1996, after graduating from a teachers training college. He later joined his current school in the year 2000. He came back from Bethlehem in the same year, primarily because his parents lived in Zamdela, the township where the school is located and he wanted to be closer to them. After serving as a deputy principal for five years, he was appointed as the principal of the school in 2001. He explained to me that he needed change and a new challenge, hence he applied for the principal’s post when it became available, taking over from his predecessor. He exclaimed:

I was looking for new challenges, because I was bored of being a deputy principal, where I spent many years. I was doing most of the work here and I was therefore not afraid to apply for this post.

When he assumed leadership role at the school, Mosiuwa was apparently not well received by his colleagues, for whatever reasons he could not explain. However, he immediately put his shoulder to the wheel and focused on re-entrenching “a culture of teaching and learning”, which had basically collapsed at the school. His experience as a deputy principal enabled him to adjust quickly to new and demanding challenges of school leadership.

It was challenging when I arrived here. It was during the defiance campaign, and I had to meet with the unions to establish working relationship with them. We drew up development plans, established stakeholders structures, all aimed at bringing back the culture of teaching and learning at the school.

Mosiuwa does not currently stay in the local community. He had lived in this township more than 15 years before relocating to a new house in the suburbs of a neighbouring town of Vereeniging, about 30 km from the school. This is how he explained it.

I stay in Vereeniging in town. I used to stay here for a long time, so I sold the house and bought another one there. I am very popular in this township and I know many people who stay in the old section of the township, not these new RDP (Reconstruction and Development) sections.

Most of the current crop of parents have attended the same school, and the school is generally held in high esteem in the township. I observed this when one of the parents, a member of the South African Police Services, came to meet the principal about his son whom he wanted to register at the school. This parent had relocated to the area and had to find a school for his child. Their conversation showed that they knew each other very well, because they started off by catching up on issues since the last time they had seen each other before discussing the reason for the visit. The principal was happy to enrol the child at the school. He later told me that he taught the police officer at the same school some years back.

4.4.1.2 Mosiuwa High School profile

This school is more than 40 years old, located in the old section of the township, along the busy main street. There is a shopping centre and a tavern not far from the school. The school has 1 526 learners, 53 educators (1 paid by the SGB), 3 administrative assistants, plus 1 intern and 2 volunteers, 4 general assistants, and 2 deputy principals. The school's infrastructure is old and many areas desperately need renovation. However, the school is fairly well maintained, in spite of the limited resources and shoestring budget as Mosiuwa explained:

Those falling ceilings and falling chalkboards become safety hazards to learners and everyone else at school. They eat on the school's pocket because every time you need to get people to fix this and that. Most of the time the bulk of the budget would go to such things.

This is a quintile 1 school, meaning that no school fee is charged to learners, but the school has consistently done well in Grade 12 results over the past five years. In the South African context, schools are classified based on the wealth of the local community from quintile 1 to quintile 5, with quintile 1 as the lowest or the poorest. Quintile 1 schools are thus by policy not allowed to charge school fees and get a basic subsidy from government. The pass rate over the past five years at the school stands as follows: 2013 = 87%, 2014 = 93%, 2015 = 77%, 2016 = 97%, and 2017 = 98%.

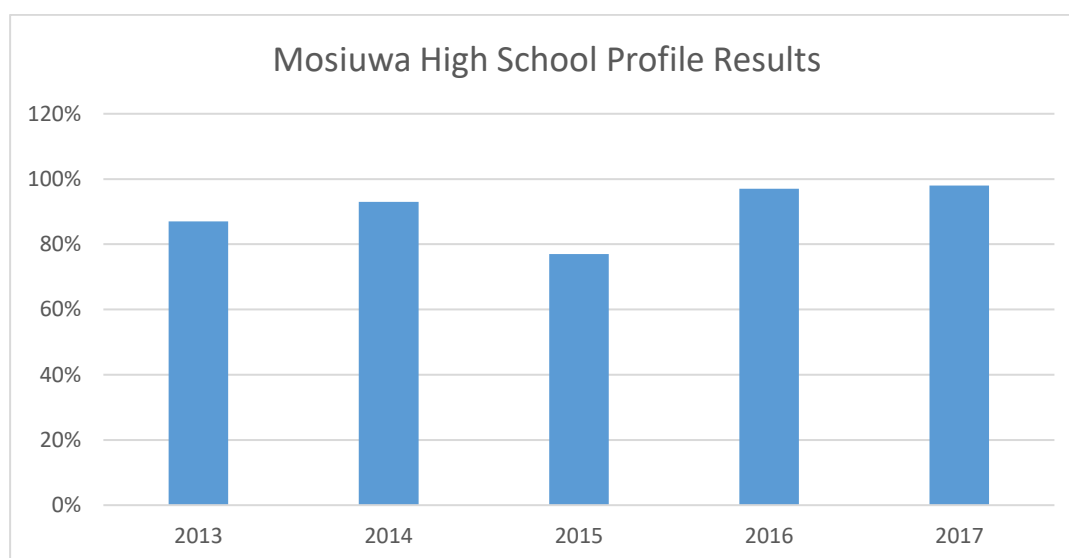


Figure 4.3: Graph showing Grade 12 results for five years

4.4.1.3 The narratives

Mosiuwa has been at this school for 30 years, and was in his eighteenth year as a principal of this big and old school at the time of this interview. He has served under various principals who were there before and has seen the school rise and fall over the years. The school had previously been the envy of many in the community producing very good results in the Grade 12 National Examinations. With changes in leadership, and the changing political landscape in the mid-2000s, learner outcomes began to fall somewhat. On the other hand, other new schools were built in the township and began to pose serious challenges to the school's reputation. He stated:

This is the very first secondary school in this township. We have produced many respectable leaders in this community. Some of them have become school principals of these other new schools and others are teachers. And now they are competing with us.

One of these new schools is Mathapelo High, which is one of the schools participating in this study. At the beginning of his tenure as principal of the school, Mosiuwa embarked on a transformational trajectory which sought to effect positive changes in the school. The changes were instigated by various factors which include departmental policies, demographics, and socio-economic pressures. When asked about the situation when he started, Mosiuwa explained his initial days at this school as follows:

When I became the principal here things were bad. Remember I had been working here and served as a deputy principal. I could not leave things to go on as they were. Our results were very bad and the culture of teaching and learning was down to zero. I had to do something.

As a new principal, Mosiuwa felt that he now had the authority to act. He indicated that he could no longer fold his arms when the school was drowning, and he sought to focus his attention mainly on improving learners' performance. His gripe is the fact that whenever teachers feel aggrieved over one thing or another, they run to the union to lodge a complaint without informing him. This is what he said:

I had to go through the union first before I could be recognised by the teachers, and this did not bode well with me at all.

He believed this undermined his authority at the school, because the union representatives would then come to the school and take the teacher's side, irrespective of whom is wrong. Here are his sentiments:

All our educators are unionised, with 90% of them being SADTU (South African Democratic Teachers' Union) members. So sometimes you need to first to go through politics before the actual business, which is teaching and learning. So if you have the bulk of your workforce being unionised, sometimes it makes things difficult for you to operate normally.

He seems to have made peace with it and is content. "Those were difficult times, I'm glad we have gone past that era now," said Mosiuwa with clear expression of relief on his face. However, he was quick to highlight the effect of the teachers' union at the school and its impact on teachers' behaviour. For example:

When you engage those SADTU guys and say to them, 'Gentlemen, you see we lost a full day last week, how do we make up for that day? Can you please speak to your members to conduct extra classes to cover for that? They'll tell you about the seven-hour rule, and that they have a right to organise and to go on such days of time off.

Mosiuwa's sentiments reflect a situation where the teacher union plays a much bigger role than perhaps would be expected, and enjoying a lot of support from staff. It goes without saying that the union always looks after the interests of its members, even if sometimes they seem to be irrational, as he suggested.

On my second day while visiting the school, I had the opportunity to walk around the school with the principal and was able to relate to some of the information the principal shared with me during the interview. As we walked around, the principal showed me some of the teachers he believed were not pulling their weight and explained how he had tried to offer development for them without much success. This was after we had gone to one class where the noise level was exceptionally high, thinking there was no teacher, only to find the teacher still standing in front struggling to gain control and attention of the learners. Apparently this teacher was relatively new in the profession and struggled with classroom management. He explained:

I had a meeting with this teacher and her HOD last week, and I asked her to change the way she manages her classes. It seems there is still a lot to do here.

There seems to be constant monitoring at the school, where members of the school management team (SMT) are assigned and required to regularly check on their blocks using systems like the period registers and a relief timetable where teachers are absent. He put it like this:

On any given day somebody is absent. So that causes a lot of problems. Discipline of children in that educator's class ... You will get learners making noise disturbing other classes, moving in and out of classes. There are your two absent teachers, you couple that with your educators who will either go to class for 5-10 minutes and when they see that everything is now quiet, they leave their classrooms. To do what? Either go to toilet or drink coffee or to fetch chalk or to make copies.

This situation seems to suggest that there are teachers at this school who consistently leave their classrooms, as opposed to staying in class for the entire class period. Regular walkabout and monitoring are aimed at eradicating such teacher behaviour and protecting teaching time, as Mosiuwa continued to explain:

It is my duty to ensure that these learners are taught. Every minute is important, and learners cannot be left alone.

When asked about systems he has in place to deal with this kind of problem, Mosiuwa explained:

We have a number of systems here. For instance, there is a period register which must be signed by all teachers as they move from class to class according to their timetables. Some of them (teachers) only enter the classes and after signing the period register they leave.

Evidently, the school has developed a number of systems to ensure effective teaching and learning takes place. For instance, the system of a period register allows for the school leadership to track whether a teacher did show up for their class period (and signed the register). This is important, as sometimes a teacher could be present at school but fail to attend to the assigned classes for the day, for one reason or the other, as Mosiuwa elaborated further:

You see, a period register is a good tool, but it can be useless if it is not controlled and monitored properly. I have realised that some teachers will only go and sign it and then leave the class, leaving the learners alone. And because learners enjoy being left alone, this becomes a free period to them. The deputy principals are supposed to monitor these period registers, but look ... (He said pointing to a class without a teacher, while we were walking about.)

However, the narrative seems to suggest that this system of class period registers was not as water-tight as some teachers could still come and sign the register and then exit the class without doing what they are supposed to do on that day. Mosiuwa seems to have resigned himself to the inefficiencies of the system they had developed. He believes there is a lot that can be done to turn the situation around. To this effect, he has resorted to regularly monitoring teacher movement every time the bell rings for change of periods. I could see that he was trying, but it was not sustainable due to other competing priorities in the office. The deputy principals also attended to their own teaching duties and could only help when they were free.

4.4.1.3.1 Policies that guide the principals' work and how they make sense of them

Principal Mosiuwa, like any other person who assumes a new job, had his own ambitions. He wished to turn the school around and become one of the most respected school principals in the community. This was prompted by the fact that there were subsequently four other secondary schools established in the same township in recent years. He was under pressure from the community to up the ante, and not be beaten by all those new schools. The urgency of this turnaround was also created by the fact that learners were leaving his school for the newly established ones.

He knew and understood the culture of the school because he had been there for a long time,

I'm the oldest teacher here in age and in terms of service at this school. All these teachers found me here.

He indicated that he had to study all departmental policies thoroughly and be knowledgeable about their implementation, especially those related to curriculum delivery such as the CAPS, human resources, which include the *Employment of*

Educators Act (RSA, 1998), and learning and teaching resources (LTSM). This is what he said:

I update myself with latest changes in the curriculum, for instance CAPS, and I make it a point that at least I'm conversant with policy documents.,

Making sense of policies

Mosiuwa went on to point out some of the constraints in policy implementation, which he found to be highly insensitive to the situation on the ground. He believed the Department of Education was not adequately sensitive to the heavy workload experienced by principals. The example he cited was the *Employment of Educators Act (RSA, 1998)* and the Norms and Standards, which outline the roles and responsibilities of educators including their job descriptions. He explained this way:

The deputies are allocated to the FET and GET bands. Apart from deputies being responsible for a band, now we have HODs being responsible for a block each. A block would consist of about four classes with their surroundings. The HOD would be responsible for everything in that block, learner attendance, teacher attendance, curriculum, whether learners are being given work, and the cleanliness in that block.

The Departmental policy on employment of educators he cited, the *Educators Employment Act (RSA, 1998)*, details all the duties of educators within a school, starting with the principal down to entry level teachers. This policy enables principals to allocate duties to educators in line with the dictates of their post levels: "... ensure equitable allocation of duties to staff" (RSA, 1998). However, he lamented the scope of work given to principals, which include teaching duties, even though it is a smaller percentage, compared to other educators in the school.

All educators are employed primarily to teach, and this involves engaging in classroom teaching as per the workload of the relevant post level and needs of the school; being a class teacher and taking care of all the learners allocated to you in that particular class; and conducting various forms of assessment and recording learner performance as prescribed (RSA, 1998).

The policy makes it mandatory for all educators, including principals, within an institution like a school to have teaching duties, and the workload varies according to post level, and depends on the size and type of school.

Instructional leadership can be defined as the actions taken or delegated to others by principals in order to promote growth in students' learning (Mestry, 2013). This notion was initially promoted by Hallinger (2005), who insists that principals complain about not having the time and the necessary expertise to be hands-on in classroom activities like supervision of teaching and instruction.

Interestingly, Mosiuwa acknowledges that the *Employment of Educators Act* (RSA, 1998), especially the job description policy, is helpful to him as a manager. However, he finds it unfair to him as the principal to be expected to have a certain minimum number of teaching duties. He highlighted this when asked if he had classes to teach, considering the workload which he complained about earlier, and this is what he said:

In the first place I don't teach. It's practically impossible and I think it has been proven that Principals should not teach. I know the law; the policy requires us to teach a certain percentage but I do not have a class. I used to have Life Orientation, but I think it was three or four years ago. I don't teach anymore.

From this response, Mosiuwa was fully aware of the policy imperatives but found it “*practically impossible*” to engage in classroom teaching, precisely because, as he said, it was too much work, and he could not find the time to do justice to the learners. He admitted that he used to teach Life Orientation before. Although this subject is not one of his major teaching subjects; however, in order to comply with policy, he tried to teach that subject instead of his major subjects, being History and Sesotho.

When probed further and asked to comment on examples of other principals who offered classes, Mosiuwa went further to explain: “*It's practically impossible; maybe at a small school.*” However, he finds this policy very helpful, as it spells out exactly what the expectations are from every educator in their different post levels, and therefore empowering him to manage effectively. His lamentations are based on the fact that although the department is aware of the principals' workload and the enormous responsibility they carry on their shoulders, it does not exempt them from teaching duties.

This is illustrated by a study on the roles of principals in providing instructional leadership in rural high schools in South Africa. Taole (2013) argues that principals still do not view themselves as instructional leaders, and that they tend to feel overwhelmed by the amount of pressure exerted on them, highlighting the fact that they are expected to teach and also manage the school at the same time.

Furthermore, they argue that teaching demands of them to know the content of the curriculum. This is further emphasised by Phillips (2012), where he avers that principals feel inadequate to initiate and develop instructional programmes considering the various subjects and learning areas taught in secondary schools, and everyone having its unique pedagogical uniqueness. With a Humanities and Languages background, majoring in History and Sesotho, Mosiuwa has taught these subjects for many years until he became a principal. He agrees that he is not a jack of all trades, but appreciates all the assistance he can get from the members of his School Management Team (SMT).

My observation is that Mosiuwa is able to implement policy and has no other problem with it except where he has to teach. The fact that he is worried about the workload also raises concerns because as he has said, teaching is not only about going to class and delivering a lesson. It involves many other aspects like lesson preparation and assessment of learners' work, and follow-ups with their parents wherever necessary. He mentioned that he is hands-on when it comes to curriculum, where he performs a number of activities, all aligned to instructional leadership. He explained it like this:

I'm also very much involved in the curriculum, especially in monitoring syllabi coverage. I make it a point that I am conversant with policy documents, for instance the assessment programme, and latest changes brought about by CAPS.

School policies

Mosiuwa mentioned several committees that are very useful to him and benefited his leadership and management. These range from sport and culture, social, to subject specific committees. Each committee has its own policies, which they draw on and review from time to time. He did not dwell much on school policies, but indicated that they also made use of subject committees where educators plan their work together

and support one another. In most of our conversations it emerged that the learners' code of conduct was frequently mentioned, which highlighted how important it is to him.

Departmental policies

Mosiuwa admitted that departmental policies are very helpful to him as a principal and acknowledges the responsibility to ensure that everyone at the school also understands them and complies. However, he lamented the department's lack of support and training for principals on policy interpretation. His view is that principals were left to navigate their survival in the deep sea on their own. He agrees that some training was provided initially, but he felt it was cosmetic and not intensive enough, especially for novice principals. He explained it as follows:

But when it comes to empowering us as principals, it is difficult. I had to find my own way; hence I always make sure that I read the policies thoroughly before sharing with any staff members.

Another policy which he found to carry much value as an instructional leader is in curriculum, where pass requirements for home language and mathematics in Grades 8 and 9 are higher than those in Grade 12. He feels that this creates confusion among learners and their parents. Learner achievement is one critical part of schooling and everyone involved in education becomes concerned if learners do not achieve. The drop in standards result in learners in senior classes relaxing and not trying hard enough to pass well, opting for the minimum requirements. He expressed his sentiments as follows:

Conditions of passing learners in Grade 8 and 9 are not in line with those in FET phase especially when looking at Grade 12 learners. The department is very strict with lower grades, for instance, Maths. Learners must get a minimum of 40%, but in Matric they can only get 30%. So these learners become lazy when they reach Grade 12 because they know they will get the pass mark with ease.

His sentiments resonate with the dictates of the Department of Education's policies on pass requirements. And while the department spells it out clearly that these are minimum requirements, learners tend to look at them as the ultimate. Hence, they start relaxing and aiming for the minimum, hoping to pass at the end of the year.

The most striking feature of these conditions of pass is the very important subject, Home language. This subject should be passed first before others can be considered. A learner who does not pass Home Language automatically fails the grade. In the FET the pass mark is 40%; yet in the Senior Phase it is 50%. This is followed by Mathematics, which is passed at a minimum of 40%, but only 30% is required in the senior classes. This drop in standards is the main concern for Mosiuwa.

What bothers him the most is the fact that he is able to challenge the Grade 8 and 9 learners to work hard in order to achieve better results; however, when it comes to the Further Education and Training (FET) band, he becomes weak because the standard in the Senior Phase is different, and seems to defeat his efforts of raising the bar and propel learners to work harder and achieve even better results.

Mosiuwa spoke passionately about the value of this policy and he felt that if he had it his way he would convince the policy makers to really review their decision on this matter. This is one of the policies that impact on his management of the school and affects Instructional leadership in a negative way.

The following are the promotion and progression requirements for the FET phase:

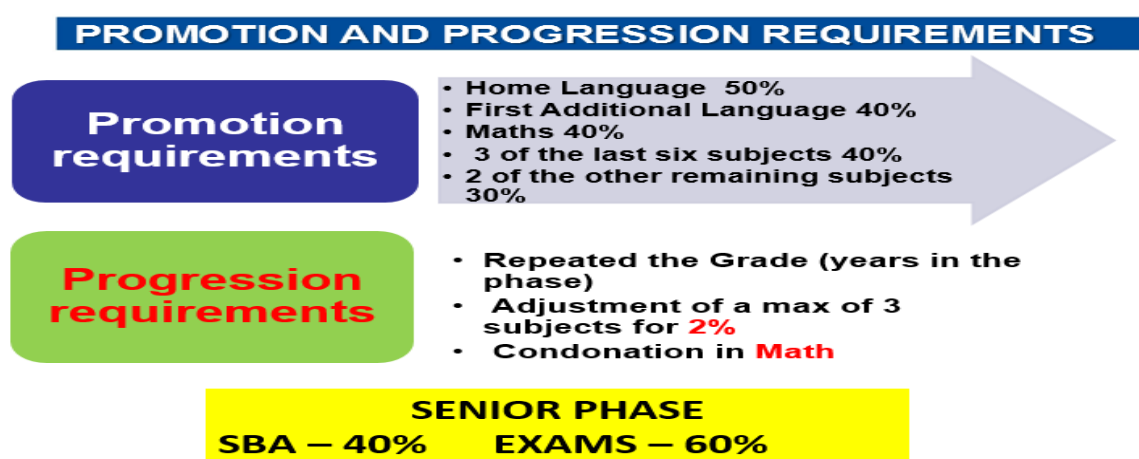


Figure 4.4: Promotion and Progression requirements (Extract from Departmental Report)

The two processes presented above reflect on the comprehensive pass requirements, and explain the progression of those learners who did not pass on their own, based on the requirements, but progressed based on conditions for progression as stated in the figure, (shown in red).

One other policy which Mosiuwa mentioned is the leave policy. He lamented the rate of absenteeism in his school, which on average stands at five teachers per day, Mosiuwa said while laughing:

Our biggest challenge at this school for teachers is absenteeism. On any given day, educators are absent. On a worse day, we get 4 to 5 educators absent. I don't remember setting foot at this school and being pleasantly surprised that everybody is here.

This policy, leave for all Public Service Employees, requires of teachers to submit a medical certificate for sick leave of three or more days, and when they become absent two or more times in an eight week period. Here follows an extract from the leave policy:

... an employee during his/her normal sick leave period, who has been absent from work on more than two occasions during an eight-week period, must regardless of the duration of the sickness or injury, submit a medical certificate stating the absence on account of sickness or injury. Failure by the employee to submit his/her medical certificate within the stated period must be viewed in a serious light and disciplinary steps against the employee should be taken.

While Mosiuwa finds this policy very useful to regulate educators and indeed all other staff members' attendance, he was quick to highlight some shortcomings. He had discovered that his teachers were playing wisely, taking only two days at a time and only completing leave forms without any evidence needed and/or submitted. He shared his experiences as follows:

They know that for instance every time when they are absent, the first time say a day or two, the first time they only fill in leave forms. The second time in an eight week period, then they're supposed to bring a doctor's medical certificate as proof of being sick and unable to work.

Mosiuwa's gripe was that teachers devised strategies to play around the policy, and this makes him as a principal helpless as absenteeism continues unabated. He had tried various ways to raise awareness of the level of absenteeism in his school, like highlighting the names of all those absent, using a bright marker, but his staff members

The department does not approve leave without pay for a teacher who still has leave credits. So you have to come back to the teacher and explain that they had credits and approve their leave anyway. This trend will continue like this with different teachers taking turns.

I would say to them, don't forget we have 36 days in a cycle of three years, and you are now in the first year but you've already been absent for 20 days.

15/10/2014				16/10/2014				17/10/2014				18/10/2014				19/10/2014			
ARRIVE		DEPART		ARRIVE		DEPART		ARRIVE		DEPART		ARRIVE		DEPART		ARRIVE		DEPART	
Time	Init	Time	Init	Time	Init	Time	Init	Time	Init	Time	Init	Time	Init	Time	Init	Time	Init	Time	Init
7:30	KL	14:50	KL	7:25	KL	14:40	KL	7:30	KL	14:50	KL	7:30	KL	14:50	KL	7:30	KL	14:50	KL
7:45	KL	15:00	KL	7:35	KL	14:50	KL	7:40	KL	15:00	KL	7:40	KL	15:00	KL	7:40	KL	15:00	KL
7:55	KL	15:10	KL	7:45	KL	15:00	KL	7:50	KL	15:10	KL	7:50	KL	15:10	KL	7:50	KL	15:10	KL
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9:10	KL	16:00	KL	8:35	KL	15:50	KL	8:40	KL	16:00	KL	8:40	KL	16:00	KL	8:40	KL	16:00	KL
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9:40	KL	16:20	KL	8:55	KL	16:10	KL	9:00	KL	16:20	KL	9:00	KL	16:20	KL	9:00	KL	16:20	KL
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23:55	KL	01:50	KL	18:25	KL	01:40	KL	18:30	KL	01:50	KL	18:30	KL	01:50	KL	18:30	KL	01:50	KL
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01:40	KL	03:00	KL	19:35	KL	02:50	KL	19:40	KL	03:00	KL	19:40	KL	03:00	KL	19:40	KL	03:00	KL</

The example above shows the number of educators absent on the said day. As he said, teacher absenteeism is clearly visible. Such absent teachers are highlighted using a marker as shown in the picture above, merely for ease of recording at the end of the day, while also aiming to conscientize those absent that they are recognised.

114 | Page

But I've since realised that since I've become a little stricter in the administration of leave, especially making sure they fill in the leave forms, there has been a little progress, but managing this takes up a lot of my time.

4.4.1.3.2 Existing structures and available resources

To raise the bar and improve conditions in his school, Mosiuwa reached out to every stakeholder he could find in the school. Mosiuwa said with a giggle,

I cannot do it alone. I held meetings with the management team, addressed learners and the SGB, to say let's work together. So when I give them tasks to do they don't complain. But it was not easy to get them on board,

The School Management Team (SMT) was very helpful and he began to allocate certain sections and blocks of the school to each of the members. Having two deputy principals proved useful, as they were made to head different sections and phases in the school, that is, the Further Education and Training band (FET) and the General Education and Training (GET) bands. The FET comprises Grades 10–12, while the GET focuses on Grades 8–9. Each of the deputy principals had a number of HODs they supervised and were allocated to the blocks as Grade heads, as he explained:

We have the FET and GET bands that have been allocated between the two deputies. The curriculum, instructional leadership, your discipline, your leave because there are teachers falling under him, your infrastructure, broken pipes, your cleanliness of the whole block and classrooms.

Existing structures

Managerial structures

The purpose of this arrangement is to ensure a free flow of information throughout the school. Mosiuwa stated:

Apart from each deputy being responsible for a band, now we have HODs being responsible for blocks. A block would consist of about 4 classes and their surroundings. So the HOD would be responsible for everything in that block, learner attendance, teacher attendance, curriculum, whether the learners are being given work and cleanliness in the block.

The deputy principals are then expected to compile reports on everything happening in their blocks and be able to share with the principal during their meetings. Depending on their urgency, these reports were given during morning briefings and SMT meetings. One such meeting I attended involved the deputy principal, Ms Seithati, announcing the names of teachers who were absent on the day and allocating duties to other educators who would be free to take care of their classes. This is how she expressed her sentiments:

Colleagues, we do not want to see classes without teachers. Please ensure that you attend to the classes I have mentioned. You know that Grade 9 learners are very difficult to control, so we don't want them to sit idle without a teacher.

Her sentiments were echoed by the principal who further emphasised the importance of attending all periods in different classes. He pleaded with teachers to attend classes promptly and not leave before the period has ended. He put it like this:

Ladies and gentlemen I cannot emphasise this issue enough. There are some of you who attend their classes but leave before the end of the period. That is why we always find learners running outside during teaching time. This also disrupts other classes where normal teaching is happening. Please attend your classes.

The mood in this briefing was sombre and educators left at the end of the meeting without engaging further on the issues discussed. I could see some of them murmuring in small groups outside the staff room as they were heading to their classes.

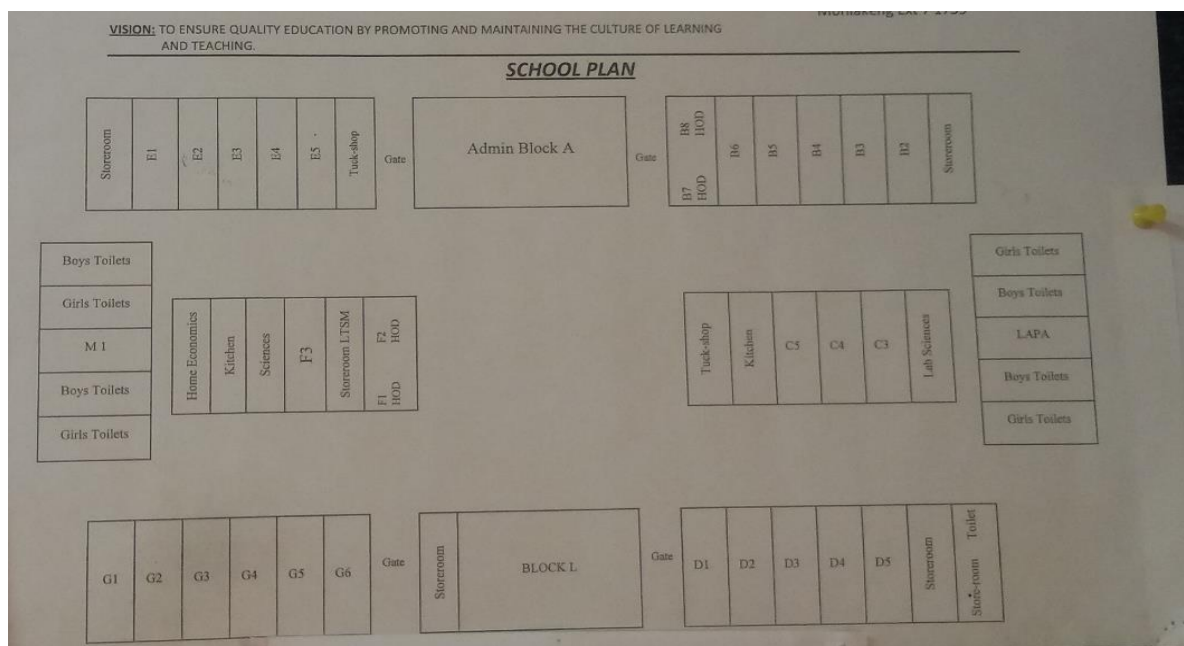


Figure 4.6: Demarcation of blocks and allocation of grade heads

The School Management Team (SMT) is made up of the principal, two deputy principals, and seven HODs. All these are promotional positions, where incumbents are appointed through the publication of an open vacancy list (Circular). This structure is responsible for the overall management of the school. Mosiuwa effectively relies on this team to spread his wings across all facets of his scope of work. Heads of departments are essentially responsible for curriculum delivery in all subjects available at the school, and the deputy principals account to the principal on the performance of the HODs.

This relates favourably with Sammons *et al.*'s (1997) assertion that the task of instructional leadership implementation would best be placed in the capable hands of head of departments in schools. Research suggests that for the curriculum improvement initiatives to succeed, there has to be adequate opportunities that will be created in order to promote and encourage collegial relations among teachers. Mr Mosiuwa distributes duties to his SMT and other educators, and this allows him time to focus on Instructional leadership, with particular attention given to Grade 12 as he intimated earlier on. This is how he put it:

The magic word here is delegation. Let me give an example, we have the FET and GET bands that have been allocated between the two deputies. The one is

dealing directly with GET band. Everything there! Curriculum, instructional leadership, your discipline, your leave, because there are teachers falling under him, and your infrastructure.

Instructional structures

The other structures he relied on are the School-based Support Team (SBST) and School Assessment Team (SAT). The coordinator of this team is normally the deputy principal, who then reports to the school principal. The principal receives reports from these structures and intervenes wherever necessary. These reports enable the principal to plan and develop enrichment programmes for learners who are not doing well in different subjects. Mosiuwa shares this information with all stakeholders, especially parents whom he encourages to assist their children with schoolwork.

Mr Mosiuwa was quick to speak about the teachers' organised labour formations inside the school. In an effort to maintain harmony in his school, he holds monthly meetings with unions represented in his school, where they discuss issues related to their members. He appreciates their assistance in talking to the members and calling them to order when they go astray. This helps to minimise tensions that arise from time to time due to misunderstanding, thereby promoting labour peace.

Mosiuwa holds the School Governing Body (SGB) in high regard as another important structure in his school. He has a good relationship with his SGB, and attributes much of their success on the involvement of the parent component of the SGB, especially the chairperson who is always available to assist whenever he is called upon to intervene. Their involvement cuts across different roles they are meant to perform, which include assisting with preparation and serving of food to learners, cleanliness of the campus, and doing some minor repairs and renovations.

He also mentioned the existence of several committees which deal with various issues, but hastened to mention the importance of late coming monitoring team. This team is in charge of learners' punctuality. They record all latecomers, and if they discover any consistency over a prolonged period, they invite parents to the school to discuss the problem and mete out appropriate sanctions.

Table 4.3: Some of the key school committees at the school (used pseudonyms)

SCHOOL ASSESSMENT TEAM	LTSM	IQMS
Mr Nhlapo Mr Kwena Mr Ximba Ms Moruri Mrs Jacobs	Mrs Ntshingila Mr Nhlapo Mrs Jacobs Mr Mofokeng Mr Hlatshwayo	Mr Hlatshawayo Mr Dlamini Mrs Mokhutso Mrs Modise Mr Mothupi
SAIC	SPORT	SAFETY & SECURITY
Mr Nake Mr Kwena Mr Ximba Ms Moruri	Mr Maseko Ms Nthaudi Ms Thebe Ms Mthembu	Mr Mothupi Mrs Jacobs Ms Chauke Ms Booysen Mr Nkhi Mr Modise
SCHOOL-BASED SUPPORT TEAM	ADMISSION	CONDOLENCE
Mr Dlamini Mr Hlatshwayo Mrs Modise Mrs Kobedi Ms Mpalo Ms Chauke	Mrs Ntshingila Mr Mothupi Ms Mokhutso Mr Thage Sgb Parent Component	Mrs Mokhuto Mr Nkgage 4 Members
NSNP	MAINTENANCE	ICT
Mrs Mokhutso Voluntary Food Handlers: Ms Thenji Ms Ngubeni	Mr Nkgage Mr Nkhi Ms Booysen Sgb Parent Component: Mr Nthedi	Ms Chauke Mr Kwena Mr Nhlapo
FUNDRAISING	ENTERTAINMENT	FINANCE: EXECUTIVE COMMITTEE
Ms Chauke Ms Mothupi Mrs Kobedi	Mrs Kobedi Mrs Modise Ms Thebe	Mr Nake: Principal Mr Naredi Sgb Chairperson Mr Lekhetso Sgb Treasurer Mrs Oliphant Sgb Secretary Mrs Msibi Finance Officer

As the table illustrates, a number of committees exist at Mosiuwa High, which give effect to the principal's functionality and success. These committees are expected to draw up plans detailing all their activities for the year.

Available resources

Managerial resources

The key resource for Mr Mosiuwa is the teachers. He believes in the potential of his educating staff so much so that he is not afraid to delegate some of his own

responsibilities to them, but most importantly their commitment to go extra mile and consistently produce good results is key. There is a big school hall, which is able to accommodate all the learners in the school. Other than assemblies, this hall also comes in handy during breaks when learners have to receive food. It makes control easier, and ensures order, because learners enter through one entrance and exit in the other, therefore ensuring that no-one cheats.

Mosiuwa also has a high learner enrolment, which results in high learner numbers in classrooms. He indicated that the district usually sends parents looking for space to register their children to his school without providing additional resources. Thus they are forced to accommodate those learners, resulting in his school being over-subscribed.

Instructional resources

Teachers are key instructional resources. As indicated in the previous section, the commitment of his teachers to curriculum delivery is unquestionable. This is confirmed by the good track record of producing excellent results in Grade 12. The school's curriculum is very broad, comprising three subject streams, i.e. Natural Sciences, Social Sciences, and Economic and Management Sciences.

Other resources critical to effective Instructional leadership are the Learning and teaching support material (LTSM). He lamented huge shortages, which are compounded by high learners they have to admit. He however admitted that once those learners are admitted into the school, they are his responsibility. Mosiuwa did not complain about sports facilities, but he indicated that they made use of the nearby community sports centre, which is sponsored by Sasol.

4.4.1.3.3 Day-to-day activities to achieve a balance

Day-to-day activities

Instructional leadership

Mosiuwa understands his role as a principal; hence, when asked to explain his instructional leadership role in the school, his first response was that he acquainted himself with policy issues on a regular basis, and his main focus at the school was

curriculum delivery. He insisted on syllabi coverage, so that teachers could have time to do revision.

Mosiwa further indicated that the school had a tool they uses that assisted with monitoring syllabi coverage and in an event that a teacher was behind, then the HODs had to ensure that the teacher drew up a recovery plan, which his SMT would monitor until completed. He intimated:

The deputies also have a form that they use to collate all the information that they get from HODs. They would also obviously be interested in the last column on those forms. The last column says: 'If there is a backlog, what intervention strategies are there to cover up for that backlog.' So they do that on the seventh of every month.

The tool is very helpful as it indicates the number of planned formal and informal tasks and activities to be completed in a specific period, as well as the planned assessments and their dates of assessment. The principal and the deputies are able to monitor learner books and complete this form, and thereafter call the teacher and the HOD to give feedback.

Principal's Assessment Tasks/Curriculum Coverage Tracking Report Sheet (FET/High Schools)

School Name:		Term (e.g. 1, 2, 3 or 4):	1
Circuit:	CIRCUIT 3	Term Start Date:	
Principal's Name:		Term End Date:	
		Month of Report:	

Grade	Subject	Assessment Tasks Coverage			Curriculum Scope Coverage			List of topics/sections which were planned for completion in the current month which haven't been completed	Planned intervention (if required)
		No of formal assessment tasks required for the term (A)	Actual number assessment tasks completed for the term (B)	% Assessment Tasks Completed Term To Date (B/A X 100)	No. of planned tasks for the term as per the approved work schedule/Annual Teaching plan (A)	Actual number of tasks completed for the term as at the month of reporting (B)	% Planned Topics/Sections Completed for Term to Date (B/A X 100)		
7	Mathematics								
	Natural Sciences								
	Social Sciences								
	Language 1								
	Language 2								
	Language 3								
	Technology								
8	Life Orientation								
	Economic & Mngt Sciences								
	Arts & Culture								
	Mathematics	2	0		17	7			
	Natural Sciences	2	1		16	9		on par	
	Social Science				6	8		movement and working - the trade unions.	
	Language 1		1		24	6		maameli	
9	Language 3		6		20	8		types of lines	
	Technology	3	1		16	16		development of the self in society	on par
	Life Orientation	1	1		46			more activities to be written	
	Economic & Mngt Sciences	12	8		23	7		covered and reflected in learners books	
	Arts & Culture	2							
	Mathematics	2	0		17	12		week behind	extra classes to be conducted
	Natural Sciences	2	1		6	0		behind	extra classes to be conducted
9	Social Science								
	Language 1	1			24	8		ibhiko mogogo lekgetho lekgetho lemany	
	Language 3		0		16	8		structures 1. photographic communication	extra classes to be conducted
	Technology	3	1		16	16		development of the self in society	
	Life Orientation	1	1		46	7		more written activities to be given to learner	
	Economic & Mngt Sciences		4		23	7		covered and ref	
	Arts & Culture								

Figure 4.7: Syllabi coverage monitoring tool

The recovery plan involves extra classes which teachers themselves must arrange with the learners, either in the morning, afternoon, or weekends, in order to cover for lost time. The heads of departments will then collate these into a timetable which they

will monitor accordingly. The HODs will then report to the principal on the developments before the seventh day of every month.

Parents and community

Some of this principals' roles include meetings with various structures in the school, such as meeting the PS staff and RCL. This is what he said:

And then once a month unless there is something pressing, I'll have a meeting with my non-teaching staff. If there is a pressing matter, then we'd convene there and there. As you have seen this morning, when the lady reported those learners who did not clean their class yesterday. I called them immediately.

He was referring to the report he received from one of the General Assistants who had come to discuss cleanliness of the classroom blocks under her control, where learners did not clean. The principal was not happy about the report and instructed her to bring the said learners to his office immediately. It did not take long, and the learners were in the principal's office. I was interested to see the culprits and what would happen to them. This is how he reacted to them:

You girls know that you were supposed to clean your class yesterday... can you tell me why you decided to go against the policy of the school? Yes...! (Pointing to one of them).

She was very scared and did not say a word. Mosiuwa exclaimed, *"I'm talking to you!!!"* One of the girls then apologised and promised it would not happen again, saying, *"Sorry sir, we were rushing for our transport. It won't happen again."* Then Mr Mosiuwa requested the General Assistant to give them the task of cleaning the class for the rest of the week as punishment. This meeting took longer than he anticipated, and there were a number of people already queuing in the foyer waiting to see him.

Impediments to effective instructional leadership

Mr Mosiuwa became very serious when talking about challenges they experienced in the school. His first concern was the level of poverty his learners have to endure. He asserted that this had a very negative effect on learners' conduct and performance. This applauded the education department for introducing school nutrition programme in schools, and this is how he put it:

We are doing our best to prepare nutritious meals for them here at school. Most of them enjoy the meal during lunch break, but there are those who are shy and do not want to be seen in that queue. It seems there is a stereotype developed around those who participate in the school's feeding scheme. I am just worried that to most of these learners, this is the only decent meal they have each day.

Late coming of learners is a serious issue, and he had been devoted much of his attention to it for a long time, with little success. On my second day visit to this school I observed a group of late comers being very unruly outside the school yard. These learners were locked outside the school grounds and the RCL members came to report to the principal that they could not keep up with the behaviour of these learners. The unhappy RCL member asked:

Meneer (Sir) please come to the gate, there are boys who want to enter by force. They don't want to listen to anyone.

This was during a morning feedback session with one of the deputy principals, Ms Seithati.

I joined them at the gate as they rushed out of the principal's office. Indeed the boys were shouting that they want to enter the school yard: *"Open up! Open up! We want to go to our classes!"* When they saw the principal they suddenly became quiet, and some of those who were leading the noise were seen trying to hide behind the others. The principal did not say anything to them, but stood there for about 10 minutes before he asked Ms Seithati to record their names and bring them to his office. These learners were made to enter through the smaller gate in a straight line, for control. When we left the scene, the situation was under control. As we left the gate I asked Mr Mosiuwa what was in his mind when he was quiet for so long at the gate, and this is what he said:

You see learners can do stupid things sometimes. I wanted to see if they would continue their unruly behaviour, but most importantly, I wanted to see the leaders of the group. Those who were in the forefront. You saw some of them trying to hide, I saw them, and I know their names. They are our habitual latecomers.

As a follow-up, I asked him what he intended to do with those learners, and he indicated that he was going to prepare letters for their parents to come to school the

following day, for serious discussions on their children's conduct, which he emphasised was against the school's learners' code of conduct.

This is aggravated by the environment around the school, which includes unholy places like taverns, where some of the learners are attracted to and from the school. He blames these places for some of the learners' addiction to drugs like dagga. In this regard they have roped in the services of the department of Social Development, where social workers visit the school and help with testing and counselling the affected learners. He said:

We try to address that, and what is important here is that they do not smoke inside the school yard. So there is a team every morning that needs to be at the gate there to try and do something to those learners. Either record them or subject them to some form of punishment as a deterrent. When they see teachers at the gate they are shy to enter the tavern. In this way they have to run so that they find the school gate still open.

What makes it worse is the fact that there are learners who come from the outskirts of the township who cannot make it to school in time. Theirs are contextual factors, because for them to be on time, it means they must leave their homes around 5:00, which is still dark, especially during winter months. This can expose them to various dangers like mugging and abduction. Mosiuwa said:

Most of the learners come from a poor background. Some of them travel as far as 7 km to come to school, in winter it becomes a serious problem for those kids. For a child to be here at 7:30, they need to leave their places at 5:30 and by then it's very dark and cold outside. And you also have crime that is rampant in our township here.

When I asked him about the impact of this late coming on learner performance, he was quick to say that most of them were not doing well, which he attributed to cumulative loss of teaching time, especially the first two periods. What complicates this matter is the fact that their parents are not supportive at all, as he ventilated: *"I called their parents sooo many times, but they don't bother ..."* As we were talking, the deputy principal came in to submit the list of those late comers we left at the gate. He quickly drew my attention to those he identified as problematic and regulars. The list had 28

names recorded for that day and six boys and two girls were identified as key troublemakers.

The educators also present serious problems of discipline. Some few educators continue to bunk classes while they are present at school. Hence they introduced the period registers. He explained it like this (pointing to one teacher who was spotted coming from the offices along the blocks of classrooms):

You see ..., the reason I make time to go around each and every block is to check on these ...

As we were taking rounds in the different blocks and sections of the school, we found some classes without teachers. The principal had to check the substitute timetable and deploy other teachers to those classes. The teachers' attendance register called 'time book' also attests to Mr Mosiuwa's sentiments (as seen in the picture of the register), that the rate of absenteeism in his school was unacceptably high.

Another challenge is that educators do not take part in extra-mural activities. Mr Mosiuwa lamented the fact that only four sporting codes are promoted at their school, and teachers only engage if tournaments are organised. On the other hand, learners are eager to participate, but they need direction from educators. According to the principal, the only time teachers would become excited to take part is when there are sports trips on Saturdays, where their school visits another school in another town or province. There, he stated despondently, one would find the majority of them eager to go on that trip:

You will be surprised to see the number of teachers who volunteer to go on these trips. No one wants to remain, because they know there will be entertainment, which includes drinking (referring to alcohol).

However, these trips have since been abolished due to the violence that was always experienced and which was associated with drunkenness by learners. In short, such trips were seen by learners as opportunities to indulge in alcohol, which mostly resulted in violent behaviour. Mosiuwa cited an example where one learner from another school was killed during a fight that broke out at a tavern where learners went while visiting another school.

We were strongly warned by the department about these trips. It was bad because the principal of that school was my friend, and had to account even when he was not there. And he suffered from depression after that incident. He was on sick leave for six months.

His narrative reflects the enormity of responsibility attached to the school principal's job. This also shows that teachers can promote different codes of sport in the school, but they prefer certain sporting codes over the others. These trips had implications on the budget, because the school would have to provide catering. On the other hand some teachers would ask for some sports equipment and if the principal did not provide, then they withdrew their involvement. Mosiuwa could not do much about this because the school did not have sufficient funds.

Parental involvement is also an issue and it is aggravated by learners' unwillingness to give letters of invitation to parents. The school was in the process of introducing the SMS system as an alternative way of improving communication with parents. The principal went on to highlight his efforts in normalising some of these abnormalities in his school, which include partnerships with outside stakeholders like Sanca, SAPS, and the Department of Health that visit the school regularly to assist in different challenges like substance abuse, teenage pregnancy and crime awareness campaigns.

Mosiuwa was very despondent when he talked about vandalism. He showed me some of the school buildings which were badly vandalised not only by the learners, but the community around the school. Most of the vandalism occurs during the night and over the weekends. The department is very helpful, according to Mosiuwa, because the circuit manager is always willing to assist whenever there are challenges, which includes addressing parents meetings and supporting educators with curriculum delivery issues.

Our circuit manager is very good at addressing parents; he is always willing to help whenever he is called. Here are some of the pictures showing the extent of vandalism in this school.

Below follows examples of vandalism in pictures. These are primary data. The pictures were all taken by the researcher.



Figure 4.8: Ceilings about to fall



Figure 4.9: Fallen ceilings



Figure 4.10: Damaged toilets

These pictures present a gloomy picture of a helpless environment which, even though they try to address, it continues unabated. It is a societal issue that the school alone is unable to confront.

Achieving balance

Opportunities and success drivers

From the school profile discussed earlier, it is important to note that this school has been doing exceptionally well in Grade 12 results climaxing with a 98% pass rate in 2017. This theme is meant to address one of the sub-research questions which was posed to all participants and it was meant to highlight strategies used by principals to achieve success in their schools' day-to-day learning and teaching. The principal emphasised his active involvement in the Grade 12 learning and teaching. Mosiuwa earlier alluded to have divided the school into sections and blocks, and also stated that matric classes belonged to him. This, according to him, ensured that he kept abreast of everything happening there, and also to drive the objective of the district to achieve certain targets. This is what he said:

I cannot leave the risk to anyone else. I have to ensure that we continue to get good results. This is a high stakes game, and winning for us is not an option. And

it gives me peace of mind because I have all the information I need to know about what is going on there.

I could not help but went on to ask him about the other Grades, 8 to 11. He was very casual in his explanation, and did not show any serious concern. He reminded me that he has divided the classroom blocks among his management team (SMT) according to the two streams, GET and FET, and that the deputy principals were in charge of them.

Extended hours

Although I was not aware on the first day, I was able to observe the principal monitoring and supervising the morning classes during day four of my visit. All teachers were present and were seen belting it out in their different subjects. Grade 12 learners are expected to attend extra classes in the morning and in the afternoon. This gives some of the teachers who have backlogs to time to close the gaps, and also attend to learners who need individual attention. Mosiuwa explained that the morning classes are specifically meant for such learners. I however realised that all classes were full, which prompted me to enquire further. Mosiuwa said boastfully as we walked from class to class collecting attendance registers,

Some of those learners are our best achievers, but they come here voluntarily to improve their performance. You see ... they compete among themselves.

There is also a roster for evening classes and study period for all learners. This is done by all Grade 12 teachers, who are divided into teams according to their respective subjects. These teams are allocated specific days of the week. This means a team can work one day during the week and some teachers can also be allocated weekends. See the following attachment showing the timetable for extra tuition:

<u>MORNING CLASSES</u>				
<u>TIME TABLE</u>				
<u>15/05 – 19/05</u>				
CLASS	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
12A	MATHS	L SC	P SC	GEO
12B	LITER	ACC/HIST	B ST	ECON
12C	B ST	ECON	ENG	L O
<u>22/05 – 26/05</u>				
CLASS	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
12A	L O	ENG	VERN	GEO/CAT
12B	ENG	L O	VERN	ACC/HIST
12C	CON	VERN	L O	ENG
<u>29/05 – 30/05</u>				
CLASS	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
12A	L SC	P SC	MATH	GEO/CAT
12B	ACC/HIST	ECON	LIT	B ST
12C	CON	LIT	B ST	ECON

Figure 4.11: Roster of extra classes (Primary data)

On top of all these extra hours, there is a curriculum delivery drive on the part of the SMT, who ensure that teachers push as much work as possible during the first six months so that in the third term they focus on revision and exam preparations. Their programme involves regular assessments per term and analysis of learner performance after each assessment. This gives them an indication of areas and subjects where they need to tighten the screws. In cases where learners do not pull together and achieve, parents are called in to discuss their children's performance, and collectively the teachers and parents work together to help the learners. All these efforts are propelled by their commitment and desire to meet district targets, especially at Grade 12 levels.

Planning

He also indicated that he had plans drawn up, which helped him to cover as many activities as possible each day. However, he confessed that it was not always possible to stick to his plan because of some of the unplanned tasks that emerged from time to time. Here is his explanation:

At the end of each year we go out on a strategic planning session. This year it's just that we did not have funds to do that. That's where we'll be sitting the whole

day. And we'll look at all the plans for the year, starting with the year plan, quarterly plan, and then the monthly plan. I then break it into weekly and daily activities.

Next follows the programme of the workshop they held in November 2017.

Table 4.4: Development workshop programme (Primary data)

STRATEGIC PLANNING WORKSHOP PROGRAMME		
DAY ONE		
Opening and Welcome	08:30 – 08:40	Ms Phalane
Purpose and Expectations	08:40 – 09:00	Mr Mosiuwa
Tea Break	09:00 – 09:30	All
Vision and Mission	09:30 – 11:00	Mr Mosiuwa
Brunch	11:00 – 11:30	All
SWOT Analysis	11:30 – 13:00	Mr Thokozani
IWSE	13:30 – 14:30	Ms Phalane
SDP AND SIP	14:30 – 15:30	Mr Mosiuwa
<i>Team Building</i>		
DAY TWO		
Welcome and review	08:30 – 09:00	Mr Mosiuwa
Year Planning	09:00 – 10:00	Ms Phalane
School Committees	10:00 – 11:00	Mr Ludonga
Brunch	11:00 – 11:h30	All
Fundraising	11:30 – 12:30	Mr Thokozani
School Policies Review	12:30 – 15:00	Mr Mosiuwa
Motivation	15:30 – 16:30	Dr Mopaki
Closing remarks	16:30 – 16:45	Mr Mosiuwa

The programme covers critical topics which reflect the level of preparedness they need for the following year. From this programme it can be seen that the principal has topics he presented and has also shared others with the deputy principals. At the end of the two days a number of documents generated include the following: SIP, Year Plan, Assessment Plan, IWSE, to name a few.

4.4.2 The story of Mrs Mathapelo

4.4.2.1 Mrs Mathapelo's Profile – "The outspoken one"

I don't just stick to 7 hours; I work up until 6 or 7 o'clock in the evening.

Ms Mathapelo is 44 years of age, highly motivated and exudes lots of energy. She is very open-minded and easy to associate with. Our engagements were very cordial and

interactive. Ms Mathapelo told me that she applied to this school because she had experienced a reasonable amount of success with her previous school, and wanted to put her abilities to the test by assuming a post in a different area, with an underperforming school. She enjoys turning things around for the better, and at the bottom of her ambitions is her desire to improve learner performance.

She is professionally qualified, with a Bachelor of Commerce degree in education, and is passionate about her teaching subjects, Accounting, Economics, and Business studies. She explained that she used to get 100% pass in matric, in all her teaching subjects. Mathapelo does not stay in the same township where her school is. She hails from Orkney in the North-West Province, where her family lives, about 160 km from her school. She rents an apartment in Sasolburg town, and only travels home during weekends, at least twice per month. Before taking up the post at her current school, she was a principal of a high-performing school in Thabong location in Welkom. She has been in teaching for 17 years of which 9 were spent as a principal, 6 at her current school.

4.4.2.2 Mathapelo High School profile

The learner enrolment stands at 1 014, with 26 classrooms, 35 educators, 3 administrative assistants, and 2 deputy principals, one male and one female. It is a quintile 1 school and therefore a no-fee school. This is a relatively new school, with a beautiful and well maintained infrastructure. There is no school hall, and although there are sporting facilities, they seem to have taken all the little space available in the small school yard. While the school is located in the old and stable section of the township, most of its learners come from all over the area.

This school has been performing well over a period of five years, starting from 2013: 84%, 2014: 96%, 2015: 81, 2016: 89%, and 2017: 94%. Above that they have been doing well in other spheres like sports and other extra-curricular activities, as evidenced by the number of trophies in the trophy cabinet display in the principal's office.

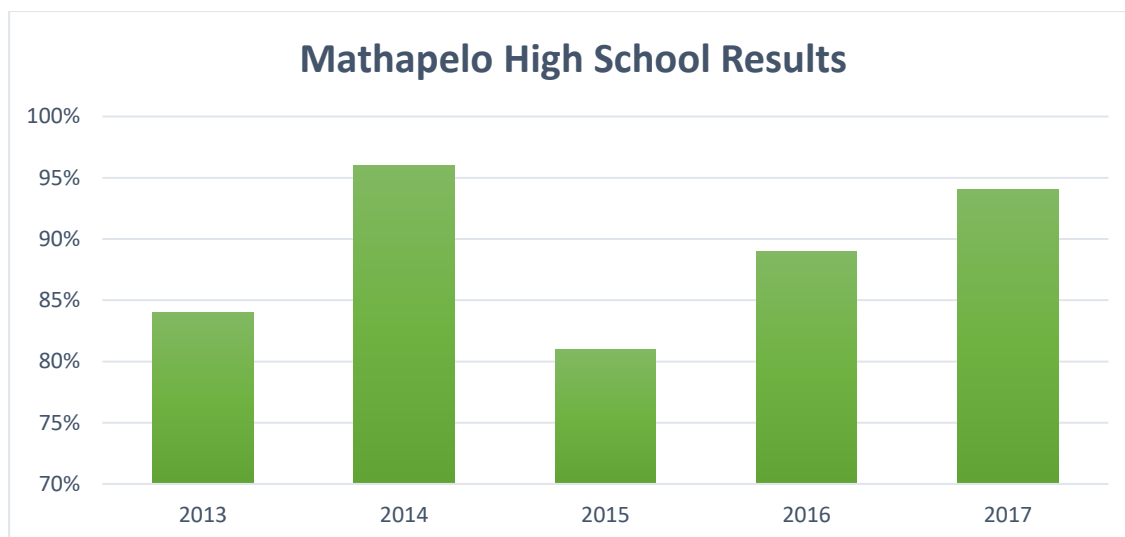


Figure 4.12: Graph showing Grade 12 results over 5 years

4.4.2.3 The narratives

During my visits to the school, I observed a few systems in place such as control of late coming and absenteeism of learners. I was also able to attend the morning briefings for staff and one staff meeting where preparations for the half yearly examinations were discussed. The morning briefing mainly dealt with important activities of the day and deployment of staff in certain areas.

I was able to observe how Ms Mathapelo delegated the responsibilities among the SMT as well as the other staff. The meeting where they discussed the examinations preparations was chaired by one of the deputy principals and it went very well, with the principal contributing wherever necessary. She had been at this school for six years already and enjoyed interacting with her learners. I was able to witness this as we took rounds in the corridors of the school as she spoke to almost everyone she met along the way, especially learners who she seemed to know by names, as she explained:

I make it my business to know the names of all these learners, because I believe that draws them closer to me. Knowing that I know them. I think it also helps me to understand their individual behaviours. You saw that one who did not comb his hair, he did not mind when I asked for a comb and did it myself.

The open and cordial relationship she has with her learners makes it easy for her to entrench her discipline.

Table 4.5: Summary of themes, sub-themes and categories

No.	RESEARCH QUESTIONS	THEMES	SUB-THEMES	CATEGORIES
4.4.2	What are the policies that guide the work of school principals in South African schools and how do principals make sense of these policies?	Directed by policies and making sense of them	Making sense	Departmental policies
				School policies
4.4.3	What structures and resources do principals rely on to carry out these policy guidelines in their dual mandate of management and instructional leadership in schools?	Existing structures and available resources	Enabling structures	Managerial structures Instructional structures
			Available resources	Managerial resources Instructional resources
4.4.3	How do principals go about their day-to-day practice of leadership and management of schools and how is the balance achieved, if at all	Day-to-day practice to achieve balance	Daily activities	Instructional leadership Monitoring and support Challenges Opportunities Success drivers
			Achieving balance	Sharing responsibilities Extra working hours Meeting set targets

4.4.2.3.1 Directed by policies and making sense of them

Making sense of policies

It is quite a daunting task to define and explain the role of principals in the context of the ever evolving policies, responsibilities, expectations, and curriculum imperatives. According to Steyn (2012), all these new changes impact heavily on the role of the principal. There are four roles that a school leader espouses on appointment. They are teacher, governor, change agent and manager (Marishane *et al.*, 2011). This scholar goes further to categorise these roles into two, the functional, which is about what the principal does, and the positional which talks to the context in which the principals find themselves in the process of carrying out their leadership tasks (Marishane *et al.*, 2011).

School policies

Her arrival in an underperforming school posed a few challenges. With the culture of teaching and learning broken down, she decided to develop a few school policies which would assist her to get things under control. In order to deal with discipline she

had to work hard collectively with the School Governing Body (SGB), to develop a learners' code of conduct which she did not find at that school when she arrived. She admitted that she had to be very careful and cautious not to effect many changes in the beginning as suggested by MacBeath (2005) that initially one ought to tread cautiously, working within the existing culture and history of the school and only later on should one become more strategic. This strategy includes identifying expertise and then supporting and developing potential teacher leaders through dialogue and staff development with the aim of building both confidence and mastery.

She indicated that things started to fall into place as the code of conduct was being implemented. This is what she articulated:

As a new principal, I did not find school policies in this school. I don't know whether they were misplaced or lost, but nobody seemed to know about them. And when I looked at the situation which prevailed at that time, I was convinced that there were no school policies in the school before. So I decided to develop new school policies. It was a very long and tiring process because the SGB was also not available at certain times, but I was glad when we finished.

Ms Mathapelo emphasised the importance of school policies which she said enabled her as the principal to manage the school in a balanced way. By this she was referring to policies like the admissions, language, school safety, learners' code of conduct, and the others. She said, also referring to policies from the Department of Education.

... as I said before, my job is to ensure that this school runs smoothly, and because I can't do it alone, I use the department's policies to guide me, especially on allocation of duties. I must say that I find them very helpful.

Departmental policies

Other policies are those from the education departments, where she lamented the educator appointment and deployment policy, which regulates the appointment and redeployment of educators. Her views were as follows:

One thing that is very challenging to me as the principal is the teachers who are not qualified to teach at secondary school and they are already here, because we will try and develop these teachers but we are not getting any success. Because these teachers are qualified to teach at primary level and you know that,

even if we are doing subject allocation, they will forever request to be given lower grades.

This has proved to be a serious challenge in this school according to this principal, because she is unable to deploy such under qualified teachers wherever she needs them. She cited an example of the time when they needed a teacher to teach Grade 12 learners, after one of her teachers got promoted to another school. It was very difficult for those in the school to close the gap, claiming they were not competent enough.

Another departmental policy she mentioned is the minimum working hours, which she found to be working against her objectives as the head of the institution. Her explanation went thus:

Another issue is the issue of minimum working hours. What I came up with here at this school is an extended hour programme, whereby my wish was that the school should knock off at 15:00. That needed us to extend everything with an hour. But because our people have rights and so forth, they didn't see it as something that we need as a school.

Her gripe was the fact that teachers did not want to work extended hours, which in essence affected her plans to achieve even better outcomes. However, if teachers are expected to work a minimum of seven hours, it remains open for extension if and when necessary. As she has said, the teachers made it a 'rights' issue, which is in fact a misunderstanding of the policy. Anyway, she could not do much about the situation as the teachers reported the matter to their union, which was sympathetic to them. She was however fortunate because all Grade 12 educators stood behind her, and supported the work beyond the call of duty.

On her involvement in instructional leadership, Mathapelo indicated that when she initially arrived at the school she discovered that there were many teachers who specialised in the commercial subjects. As an Accounting, Economics and EMS teacher, she was unable to teach because there was no need for her services in that department, and she became redundant: Here is what she shared with me on this:

I teach Accounting, Economics, and EMS, but now because that department is over-staffed I was not going to have periods to teach. Already, teachers in that

department don't have the same number of periods as other subjects, like Mathematics teachers. So if I happen to have classes, it means their workload is going to be very low.

Mathapelo expressed serious sentiments when asked about her workload, and a hectic schedule affecting her offering classes in the school, as part of her job description. She voiced her wish to teach but under her prevailing circumstances, it was very unlikely, as she said:

I think I can try to teach, though it is going to be very difficult at times. I'll make an example, sometimes I have to attend meetings, I have to attend to parents' grievances, so, and if I'm teaching it means I will have to see parents at half past two. That can be done, but in a case where I have to attend to urgent matters like meetings, it is going to be impossible for me to teach well.

However, she indicated that her not teaching did not deter her from visiting teachers in their classes to observe them in action. She also monitored teaching and learning by taking learner books and checking on the amount of work given, as well as the scope of work covered. She indeed has her pulse on instructional leadership, although she spends most of the time focusing on Grade 12.

4.4.2.3.2 Enabling structures

Structures enabling effective instruction

Although the principal did not mention specific problems with regards to discipline of the staff, there was an occasion where during observations, I noticed some tension between one of the teachers (Science teacher – Mr Nkomo) and the HOD and the principal. This teacher was called to one of the “performance discussion” sessions that the principal holds once a term with all teachers from Grade 10 to 12. The learners' performance was very poor and the teacher was very stubborn and insubordinate in his responses. He did not want to take responsibility for the poor performance, always blaming learners and other staff members. The following is an extract of the tape recording I made of that meeting:

Mrs Mathapelo (Principal): Mr Nkomo I called you here to discuss your work. I have been discussing performance with other teachers in other departments and yesterday I called you but you did not come. This is why I said we should meet

you this morning with the deputy and Ms Tau (HOD). You know that every quarter we have these meetings neh ...? (She expected a response from the teacher (Nkomo) but he was just staring at her without saying a word).

Principal: Mr Nkomo, can you explain why learners perform like this in Physical science?

Nkomo: What do you want me to say?

HOD: Mr Nkomo, the principal wants you to explain why learners are failing your subject. Please explain to us so that we can help.

Nkomo: I don't know what you want me to say. I told you everything.

Principal: I want to know Meneer ... What did you tell us? I don't know anything.

Nkomo: I have been telling you since the beginning of the year. These learners do not listen. They do as they want, and I can't say anything to them.

Principal: What did you do to address this problem Mr Nkomo?

Nkomo: What do you want me to do? I can't do anything with people who don't listen (referring to learners).

This meeting lasted for about 40 minutes, but did not produce any tangible way forward due to the intransigence of the teacher. At the end of the session Ms Mathapelo confided in me that the teacher, Mr Nkomo, was one of her worst nightmares at the school. Apparently, he is a BSc graduate and has such an ego, which propels him to disregard anyone else. This teacher used to teach Grade 12 when he joined the school, but due to poor content delivery and under-performance, he was removed and relegated to Grade 10 and lower. Mathapelo admitted that she had exhausted all her strategies on this matter, and although she had tried several times to seek assistance from the district office, the problem had not improved, which means she was stuck with the problem for the rest of her life at that school. A very disappointed Mathapelo said:

I have tried everything I can to get this teacher in order, but you know what ...? I can't think of any other strategy anymore. Even the department knows about him, he behaved the same way when the district director was here at our school last year.

I could feel her pain as she related a number of incidents involving arguments and tensions with this teacher. It was tense during the accounting session, and I felt a sense of guilt, thinking that the teacher behaved like that because of my presence, but I was relieved when Mathapelo started explaining and giving the background of this teacher. However, I probed her further on this matter in order to check if there has been any disciplinary action that was taken against the teacher. Her response was a very despondent and lacklustre “yes”. This is how she replied:

You know ... when I arrived at this school ... I think it was after about six months, I initiated disciplinary action through the district office. They came here and discussed the issues with him, and I was told they were investigating. I later heard that the case was dismissed through the insistence of the union.

Realising a change in her mood when talking about this case, I reluctantly asked what issues drove her to initiate disciplinary action in the past. Mathapelo was at pains to explain that she could not stand the kind of insubordination that the teacher displayed towards her; hence, she wanted to deal with this kind of behaviour in its initial stages. She was, however, frustrated by the procedures and processes followed, as she explained,

I thought I was solving a behavioural problem, yet it was bigger than that. I am really frustrated.

As indicated earlier on, the principal holds ‘performance discussion’ sessions with different HODs and the relevant teachers after the release of term learner progress reports. She indicated that this system helped her to identify problem areas and deal with them in time before they affect the year end results. She involved the School Management Team (SMT) in most of her activities. Of the five HODs, one deputy was responsible for three departments and the other one for two. She explained that the deputy principal with two departments had a lot of work, because one of the departments was for languages, which included four languages. She explained it like this:

The other one is responsible for Grade 11 and then as far as Grade 12 is concerned, I’m personally managing Grade 12s. The deputy principals each has HODs as his downline. One deputy principal is handling three HODs and the

other one is handling two. The one handling two HODs is because the other HOD is for languages and we've got four languages at our school.

Managerial structures

Other structures that exist at the school include the School-based Support Team (SBST), SGB, and the Representative Council for learners (RCL), amongst others. She explained that she interacted a lot with learners, where she held meetings with them, but was quick to point out that they had a very dedicated RCL, who met with her regularly to discuss matters affecting learners. She believed that this approach enabled her to know the learners in the school, especially those with problems, and they could also relate to her in a positive way.

Her approach aligns with Spillane and Diamond (2007), who assert that a distributed perspective on leadership comprises two aspects, the leadership-plus aspect, which accepts and recognises the efforts of every individual who has made a contribution in leadership and management activities instead of only focusing on those who occupy formal and designated leadership roles. The second one is the practice aspect, which is entrenched on the practice of management and leadership. Her recognition of learner leaders has endeared her to most of the learners in her school, hence they do not experience any serious issues of discipline from learners.

As a stickler for order and discipline, Mathapelo told me that she did not like learners roaming about on the school grounds; therefore she had introduced the permission cards that were given to learners whenever they had to go out of a class, and each class was allowed only two at a time. This ensured that at any given time, each class allowed only two learners to go outside.

I don't like a school where there is a lot of movement outside. Learners in this school know that they are not allowed outside the classroom. In the past years we used to have learners going up and down the corridors for one thing or another, and we sat down with my management team and came up with the idea of permission cards. Every teacher has them, but they can only allow two learners at a time. Since we started with this I can say that there has been a big change. As you can see, our learners are always in their classes.



Figure 4.13: The outside – while teaching and learning is taking place in the classrooms

Apart from these systems they also had period registers, late coming, early departure and ground supervision registers, which assisted with bringing order and control at the school. She explained that they also had a roster which they used to supervise classes of those teachers who were absent. This relief timetable is generated from an administration software called SA Sams, where teachers who do not have lessons every period are identified, and deployed to the classes where there is a need. This is so spontaneous that no-one would see. It seems like a deeply entrenched culture in the school, thanks to the cooperation of educators.

Enabling Resources

Teaching and learning resources

Mathapelo's school is smaller compared to the previous school discussed in this study. There is no school hall, but they have strong and solid buildings which are well maintained. She decried the shortage of textbooks (LTSM), which emanates from learners not returning the books they were borrowed during the year. Their parents are also not cooperating in terms of replacing the lost or stolen books. As far as teachers are concerned, she was not happy with the primary-school-qualified teachers who were at her school, and could not teach senior classes. Her success was shaped by all those who were determined to succeed against all odds and go the extra mile.

Managerial resources

The school is over-subscribed due to a high demand for learning space, and this results in a plethora of problems including, learner discipline, infrastructure overload, and extra teaching posts, amongst others. There are only a few sporting facilities, which are observably not being maintained well.



Figure 4.14: Some of the sporting facilities at the school (Photo taken by T J Tshabalala)

4.4.2.3.3 Day-to-day practices to achieve balance

Daily activities

Ms Mathapelo believed her role as the principal was mainly to ensure that the school runs effectively and everyone was doing what they were supposed to do in line with the vision and mission of the school as proposed by renowned scholars, that school leadership is about setting direction, which involves generating and implementing the school vision, setting up objectives and goals, putting measures to raise the bar on expectations while encouraging others to follow through the school's mission (Hallinger, 2003; Leithwood *et al.*, 2009). Teaching and learning is at the heart of all her activities as she indicated:

SMTs are also supposed to teach learners and maintain discipline, control teachers' work and do monitoring, while also forming part and parcel of decision making in the management of the school.

She went on to emphasise that she has to ensure that the school performs well and strives for excellence at all times. Her main priority was teaching and learning, which she monitored randomly each day, while on the other hand watching over the other staff, like the general assistants and administration assistants: Her take on this is as follows:

As an accounting officer, we have the general assistants and the clerks, I have to make sure, and control that everyone is doing what they are supposed to do. I manage while walking around the school.

Confronting the daily inevitable – impediments to effective instructional leadership

As in other schools, this school is also going through a plethora of challenges. Ms Mathapelo did not mince her words when talking about learner pregnancy rate at her school. She appeared to be very worried about girl learners in her school who fell pregnant by the time when they reach Grade 12. As a school, they were always doing their best to address the issue but it kept coming through. Her major worry was that the departmental policy allowed pregnant learners to attend school until shortly before they gave birth, which placed a lot of responsibility on her shoulders as the principal to ensure the safety and welfare of such learners.

Some of them want to return to school a month after giving birth, ignoring the time they lost while they were away. She explained further:

The issue of pregnancy ..., I don't know ... It's like these kids are having a mission. A learner might not get pregnant ..., but when they get to Grade 12, one way or another they feel like now it's the time to fall pregnant.

She gave examples of their efforts to combat this issue, where they have sought the services of the Health department. They organised campaigns and talk sessions where boys and girls were addressed separately on sexuality issues, which included the effects of teenage pregnancy. She felt helpless but was still determined to continue educating them, especially the girl learners, about birth control.

Another serious challenge she mentioned was the retrieval of learning material loaned to learners at the beginning of the year. Most of the learners at her school did not return the textbooks, claiming they were lost or stolen. When they had to pay for them, it

became a problem because their parents could not afford to pay. This impacted very badly on their resources the following year, where learners would have to share. This challenge related very well with lack of parental involvement. Mathapelo lamented the way parents did not show an interest in the affairs of the school. The only time they came was when they knew they were going to get something, either job opportunities or business. She went on to say:

The issue of learners losing the textbooks and so forth, our parents cannot afford and they are not instilling that thing to the learners, that you cannot lose your textbooks, otherwise you will have to pay. You'll find that other learners cannot have the LTSM because the books were lost and parents cannot pay.

Vandalism, burglary and crime are also a serious concern at this school. During the second day of my visit to the school, on Monday 22 May 2017, we found that there had been a burglary and thieves had helped themselves to some of the big cooking pots and other utensils used in the school's feeding scheme kitchen. All these were locked in the kitchen on Friday late in the afternoon when we left the school.

On Saturday, during extra classes, there were no signs of any burglary, meaning that it happened on Sunday night. There was no trace; however, the police were already working on the matter. Mathapelo told me that it was the third burglary in two weeks. What made her sad was the fact that the school was not far from the houses; in fact, was right next to nearby homes, as she painstakingly explained:

The rate of crime here is high and also because it was not the first time we had a burglary. We had it this past week and I think it's two weeks back we had another one. So they normally come to the school and steal our things.

One thing worth noting with this principal is that she does not give up easily and always aspires for change. This is exemplified by the fact that even though she looked saddened by the loss of some of their equipment, her spirit was high and was going around motivating the kitchen staff that they would get the lost items back. These challenges often take up a lot of her time, because she has to go to the police station and open a case or report the matter in person, instead of being at school managing and leading instruction.

Striking a balance

Sharing responsibilities

Ms Mathapelo's school has been doing well in the past five years, producing good matric results. The success of the school is driven by a number of factors, and as mentioned before, the principal practises distributed leadership, which involves devolving some of her responsibilities to the two deputy principals and five HODs as block heads and grade heads, respectively. This enables her to keep abreast of all activities in the entire school.

A combination of distributed leadership and establishment of effective systems have put this school to where it is currently. The teachers are highly motivated and most of the staff members are still young, which also propels the youthful principal to want to do more. Mathapelo also indicated that they had a very supportive circuit manager who was willing to walk the path with them, which is also in line with what Mosiuwa said. It is not surprising, therefore, to find that most of their systems are more or less similar.

Instructional leadership programmes that bring about success

Mathapelo shared a number of activities they are involved in, which collectively seem to yield the success that has been achieved in the school. While she emphasised effective teaching and learning, she also indicated that she would randomly go to classes and take a few learner books to check. If there were discrepancies, she called the teacher, learner and the HOD to account. If there were backlogs, the teacher had to arrange extra classes to bridge the gap under the supervision of the relevant HOD. She said:

I do a random control, an unannounced one, where I control books from Grade 8 to 12. I do it quarterly. I take three books per subject and will write my report. That does not exempt HODs and Deputies from doing their work. I must have my own report on teaching and learning. Then I will call the teacher and the learner and give them feedback, and where necessary I will involve the HOD.

Extended hours programme

A special programme is designed for the Grade 12 learners, where like at many secondary schools, there are extra classes after normal school hours. Teachers use this time to cover as much work as possible. There is a timetable that runs from Monday to Friday and over weekends. In a related study by Grissom and Loeb (2009), it transpires that it is not just the allocation of time, but also the principals' sense of their effectiveness at these various kinds of tasks that makes them effective.

Again, organisational management emerges among the various roles and responsibilities as the key predictor of the effectiveness of the principal, using measures derived from multiple constituents and on multiple dimensions. Mathapelo alluded to using this extra time to reflect on her other managerial tasks, and to complete some of her submissions to the district office as they become due.

I manage to balance my work by working more hours, I don't just stick to 7 hours. I work up until 6 or 7 o'clock in the evening. I'll have things that I'm intending to finish per day or sometimes per week. So every day I have those targets that I must attend to.

I was able to see Mathapelo working late during day three of my visit, where she was checking on the Grade 12 exam entries schedule for her learners. It was due for submission the next day.

Meeting set targets

On top of this there was also a roster for night duty. Ms Mathapelo told me that she also took turns sleeping at the school. The programme involves extra teaching and study in the evening, and again early in the morning at 6:00. She was quick to explain that with this extra time, every teacher was afforded enough time to complete the syllabus by the end of July, because she acknowledged the fact that they had a lot of work if they were serious about meeting set targets. They also invited district subject facilitators to assist teachers in areas of need, where such teachers were guided and supported in their classrooms on an ongoing basis.

Mathapelo explained that every subject was given a target to meet right at the beginning of the year, based on the previous year's performance. These targets are

negotiated with relevant teachers who then have to agree, and develop strategies they would employ to achieve them. She explained it like this:

I have a plan from the district which indicates the targets that should be met for every term.

Going the extra mile enables her to achieve all her goals even though sometimes it is difficult due to unplanned internal and external factors such as district meetings and community service delivery protest.

4.4.3 The story of Mr Gomolemo

4.4.3.1 Presenting Mr Gomolemo – Mr Clean, leading by example

It makes me happy when I take my rounds and the school is clean and quiet as if there are no learners in the school.

This principal has 19 years' teaching experience, and has been a principal at this school for seven years. The participant's career started in 1998 as a teacher at Azaadville Secondary School in Krugersdorp where he taught Afrikaans. He later joined the District Office as a Geography subject facilitator, a job that entailed many visits to schools doing monitoring of policy implementation and capacitating educators in the subject.

He explained that he soon got bored and lost interest precisely because, as he said, the teachers did not implement their recommendations and the situation remained the same. This frustrated him and then one day he took the bold step to apply for the principal's post at the current school. He explained it like this:

When I was working at the district as a subject facilitator for Geography, I used to visit all schools in this district and every time I would advise educators on how to improve on their work, but next time when I visited them again to check on progress they made, I would find most of them still there where I left them. No change at all. This frustrated me, because I felt I was wasting my time. These teachers used to complain about many things. So I left.

He was duly appointed as the second principal of the school after the founder had left. Since then he has never looked back. He is professionally qualified, with a Bachelors'

degree in education and adequately experienced to lead his school. He is widely respected by all within and outside the school. He is a devoted Christian, always quoting verses and scriptures from a Bible that stays on his office table, a very humble and friendly person who is well grounded in educational matters.

This principal told me that he had come to that school specifically because he had always wanted to contribute towards the upliftment and development of his township, Mohlakeng, which is where he was born and educated. His explanation is like this:

I grew up here, and I wanted to contribute something to my community. I know many people in this township and most of the learners in my school, I know their parents because we grew up together and some of them attended same schools with me.

4.4.3.2 Gomolemo High School profile

The school is one of the best township schools in the area, and it has consistently been producing very good matric results. It is the only township school in the district that offers English Home Language. When this principal assumed leadership at this school, there were only 400 learners doing only Grades 8 and 9. He worked very hard with much dedication to build the school to the current enrolment, as he succinctly put it:

We must teach the learners and we must work together as a team, because I believe in teamwork, because I can't do it alone. I need other people to help me to take this school forward and I have seen the results of that, because since I came here in 2011, I think there were just 400 learners, but we were able to grow the school to what you see today.

There are 1 215 learners, 26 classrooms, 42 educators, and one deputy principal. The staff is mixed, the majority black, and a few white teachers, and mixed age groups. Over the five-year period, this school has consistently been doing well, producing good Grade 12 results; 2013 = 82; 2014 = 94; 2015 = 89; 2016 = 96; 2017 = 93. This performance earned them a respectable position in their district and community at large.

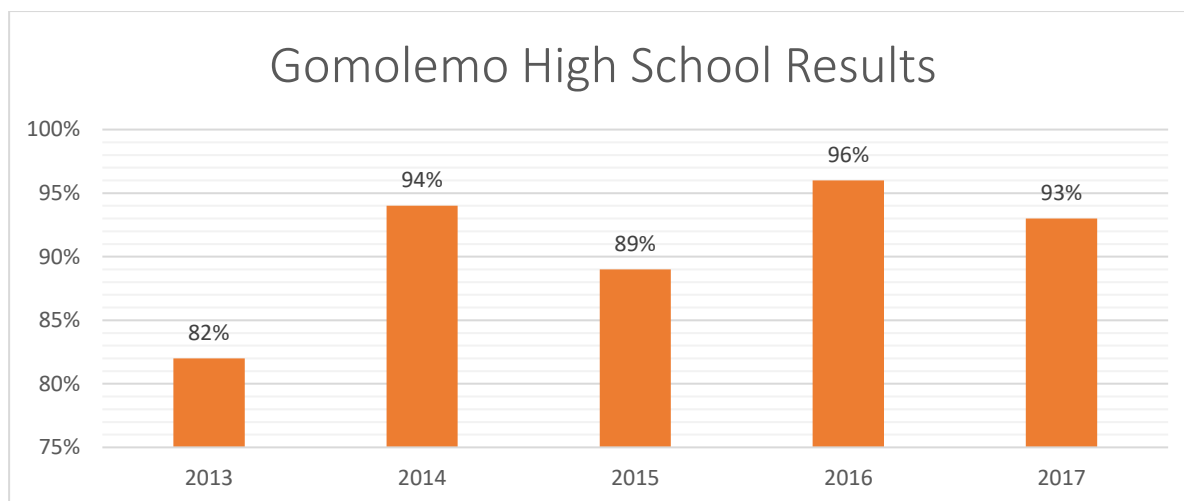


Figure 4.15: Graph showing Grade 12 over five years

In 2017, the school received handed a brand-new multi-sports complex, which was built by the private sector in partnership with the Gauteng Department of Education. This gesture marked the turning point regarding the negative perceptions of some community members about the school, where a girl learner was murdered right in front of the school gate. It was alleged that the girl was involved in Satanic activities, and was murdered by other cult members who were also learners at this school. This issue made national headlines and the community started to distance itself from the school. This is how he related it:

After that incident in 2012, when that learner was stabbed, that issue of Satanism. We then decided, because it was a spiritual issue, we thought we needed the intervention of the pastors. To come and offer prayers in the school. We therefore decided to have assembly every day, because we were told that is the only way to deal with Satanism.

He was emotional and close to tears, as he explained his excitement about the sporting facilities, which include their own showers and ablution facilities. This is what he said:

I am very excited about these facilities because they have put our school on a higher pedestal. We will be able to host some of those tournaments which are normally hosted by town schools. Having schools coming here will also expose our school to many learners who may want to attend here rather than in town. The community has already come forward to offer assistance in maintaining them.

The discussion suggests that many people now wanted to be associated with the school. The sporting facilities are the first in the townships and one cannot help but pray that the community will take care of them and protect them. The principal intimated that one of the first few things he did on arrival at this school was to identify major role players and stakeholders, such as the SMT, SGB, RCL, general assistants, administrative assistants, and educator union reps, and pledged his support for their activities. His focus is the improvement of the culture of teaching and learning, paying special attention to instructional leadership and professional development of the staff. He is a devoted leader who believes in exemplary leadership.

4.4.3.3 Narratives

Principal Gomolemo is a very principled and strict principal who is also in his late forties. His staff comprises a generational mix of young and middle aged teachers. The school infrastructure is beautiful and shows that the school is relatively new. The attitude of the principal towards cleanliness is reflected all over the school grounds. He strongly believes in a healthy and clean environment, which include learners' toilets. He told me that he often cleans the toilets as a way to motivate learners, but as a personal expression of how he feels about them.

Gomolemo believes in leading by example, and this kept on coming up during our discussions. His leadership style manifest through leading from the front, which from my assessment of the situation was propelled by having stayed for some time without a deputy principal and few HODs. He got used to doing things on his own, such that even now when he has a deputy and more HODs, he still continues in the same trajectory.

Many scholars, including Schoen and Teddlie (2008), agree that the environment of the school depends mostly on the initiative the principals put behind it. It is incumbent on principals to ensure their school environment is palatable for effective teaching and learning and the climate is inviting (Schoen & Teddlie, 2008). This environment starts with visibly clean school grounds and buildings and extend to harmonious relations among staff. Gomolemo's strategy is to provide an environment that is attractive to both staff, learners, and the broader community, this in turn enables him to gain their

buy-in in terms of instructional leadership, as everyone now feels proud to be associated with the school.

Table 4.6: Summary of themes, sub-themes and categories

No.	RESEARCH	THEMES	SUB-THEMES	CATEGORIES
4.5.1	What are the policies that guide the work of school principals in South African schools and how do principals make sense of these policies?	Policies that guide the principals' work and how they make sense of them	Making sense	School policies Departmental policies
4.5.2	What structures and resources do principals rely on to carry out these policy guidelines in their dual mandate of management and instructional leadership in schools?	Existing structures and available resources	School Structures	Managerial structures Instructional structures
			Resources in the school	Managerial resources Instructional resources
4.5.3	How do principals go about their day-to-day practice of leadership and management of schools and how is the balance achieved, if at all	Day-to-day practices to achieve balance	Daily practices	Teaching and learning Stakeholder interaction Monitoring and support Challenges Opportunities and success
			Achieving balance	Planning Distributed leadership Extra classes

4.4.3.3.1 Education policies and deriving meaning from them

Making sense

School policies

He started by developing school policies together with the SGB, which were aimed at ensuring that all stakeholders make contributions and are able to participate in the school activities. He alluded to the lack of discipline amongst learners initially, and they had to entrench the school disciplinary code of conduct, which he championed very well, starting from dress code to hairdo by both boys and girls. His motive was to make sure that his school does not differ from those in towns and suburbs, because some of his learners came from former Model C schools in town.

Departmental policies

Gomolemo acknowledged that there were many departmental policies, but went on to explain that he made sure that they found ways to implement them. Amongst the policies he mentioned are the learner attendance policy, which is supported by meticulous marking of class attendance registers by teachers. The learner attendance register is a legal document that should be marked meticulously and consistently every day of school. In his school these registers are marked by admin staff, using information supplied by class educators on daily basis. This information is then collated and submitted to the principal for final checking and monitoring. See the following example:

NAME OF BLOCK PRINCIPAL	SA	SB	SC	SD	WEEK ENDING	SUBMITTED, COMMENTS OR CHALLENGES	SIGNATURE
					DATE		
MEUPHI M.P	✓	✓	✓	✓	22.10.17	All registers submitted by Block Principal and completed.	
MEUPHI M.P	✓	✓	✓	✓	29.10.17	All registers were submitted and completed in SPMS (Absence of form)	
MEUPHI M.P	✓	✓	✓	✓	05.11.17	All registers were submitted except for Mr. Mopos register.	
MEUPHI M.P							
MEUPHI M.P							
MEUPHI M.P							
MEUPHI M.P							

Figure 4.16: Monitoring tool for submission of registers (primary data)

He personally checks on those that are regular absentees and does a follow-up with their class teachers and parents. His sentiments were as follows:

I also monitor class registers, I collect them every Friday, the administrators mark them and then after marking they bring them to me to see those habitual absentee learners, and I will write a note to say the teacher must make a follow up, because the absenteeism of those learners is unacceptable.

Mr Gomolemo encouraged teachers to attend district subject meetings where they could increase their knowledge and capacity in line with the Employment of educators. These meetings encouraged teachers to belong to the Professional Learning Communities (PLC) according to their different teaching subjects.

I encourage my teachers to work with other teachers from other schools. You see if I have a problem with anything in my school I always ask for help from Randfontein high, so I encourage them to do the same with their subjects, also attend workshops conducted at the district.

He went on to cite an example of his deputy principal who had recently been appointed:

We never had a deputy before because our school was still growing, but as soon as she arrived (referring to the deputy) I told her that I was not going to teach her everything. She will have to liaise with deputies of the other schools so that she can learn other things.

Although the PLCs are relatively new in South African schools, his teachers seemed to have established these structures even at school level, and he felt they played a very important role in extending his oversight role, even to the deepest corners of curriculum policies which under normal circumstances would have been a nightmare to him. I observed that smaller meetings were held in the staff room, mainly after contact time, during my four-day visit to the school. The principal was not part of them but explained that those were subject meetings that were led by subject heads.

Instructional policies

Several authors propagated the idea of Professional Learning Communities (PLCs), which are teams of educators who regularly work together in their different subjects to share ideas and take collective responsibility for the improvement of teaching and learning at their schools (DuFour *et al.*, 2009; Mullen & Huting, 2008; Vescio *et al.*, 2008; Wood, 2007). The success of PLCs is attributed to the expert collaboration of best practices by teachers and other staff members (Wood, 2007).

He also took the initiative to ensure that teachers understood their roles and responsibilities, especially with respect to teaching and learning as well as extra-curricular activities, by arranging specific workshops for his teachers in areas where they needed assistance, as part of staff development. He continued:

I normally send them to Matthew Goniwe for workshops. And they take turns, so that they all have a chance (smiling). But sometimes we invite some of the subject specialists to come and help, even to motivate them, you know.

These workshops are conducted by different service providers who have partnered with the school and include motivation sessions for both Grade 12 learners and educators. He mentioned their relationship with the Department of Social Development, who assists with the provision of school uniform counselling services and support for learners, and the Department of Correctional Services, which focuses on behavioural change and rehabilitation. These sessions seem to be working well for this school according to the principal, and they have seen dramatic change since their partnership started.

As much as he agreed with the other participants on the pressure of work on the shoulders of school principals, he cited his eagerness to teach. He currently does not have a class, but he does go to classes in the event there is a teacher absent, and what he does in those classes is merely to assist wherever he can. This is what he said:

I cannot say I have a timetable of my own, but a relief timetable. If a teacher is absent, we normally would take the learners to a teacher that is free. But at times you find that during a particular period all teachers are busy. So I will go to that class and teach.

I followed up to find out what he was teaching in those classes, and this is his response:

I will check if whatever they were doing is something I can be able to teach. I'm always comfortable with English or Setswana or Life Orientation and Life Sciences. The only difficult subject for me will always be Mathematics.

Several empirical studies emphasise the creation of fertile opportunities for teachers, working collectively with one another in leading development and change in their schools. In order to achieve this, school principals have to work very hard to develop and build capacity of their staff members, especially teachers, in order to sustain best output. It is therefore imperative for school leaders to employ distributed leadership together with trust and social cohesion in order to enhance the human potential and capacity in their schools (Fullan, 2001; Newman & Wehlage, 1995; Sergiovanni, 2001; Chapman & Allen, 2006).

In essence, Gomolemo did not indicate any shortcomings or complaint with regards to departmental policies, except to explain that his task as a manager is to ensure policy

implementation and compliance in the school. However, he focused his attention on the implementation of all policies. He explained his role as follows:

That's part of our management to ensure that those policies are being implemented, and we must adhere to them. I believe that policy is a legal document. So they must guide us in whatever we are doing as a school.

4.4.3.3.2 Existing structures and available resources

Structures within the school

Managerial structures and their functionality

This principal encourages and promotes teamwork in his school. There is only one deputy principal who was appointed about eight months before my visit, and the principal explained that he did not have the deputy principal before and had to do everything on his own. Gomolemo now feels encouraged since her appointment, together with the four HODs who collectively constitute the SMT. The deputy principal is in charge of curriculum delivery and is head of all HODs. The school is divided into blocks, which are headed by HODs. On the question of deployment of resources, structures and systems he responded like this:

We do have block heads; we call them block heads. We have four. In the past we were working with two HODs, so I was responsible for the one block and the deputy was responsible for the other one. Luckily now, the HODs are four and there are four blocks. And we are fortunate to have the infrastructure the way it is because now learners are contained within, unlike in other schools.

I got a sense that Mr Gomolemo was beginning to enjoy being the principal of the school after the appointment of the deputy principal and the two HODs. He explained that he used to do everything on his own before; hence, he adopted teamwork as a strategy to cover more ground. A number of responsibilities were shared among staff members irrespective of their positions. He fondly narrated that several committees had their own leaders, specifically mentioning the SBST, IQMS coordinator, SAT, and the DC as well as the LTSM committee. He put it like this:

The structures are basically working as a team, and as we will be starting with mid-year exams, the deputy is co-ordinating everything. SAT has drawn the

timetable and has also mediated it to the staff as a whole, indicating the role required from each committee.

Teaching and learning structures

He also mentioned one committee which he said was very important in his school, the School Assessment Irregularities Committee (SAIC). This committee is responsible for any irregularity that may occur during assessments, especially during the examinations, resolves challenges and report to the District Assessment Irregularity Committee (DAIC). The irregularities handled by this committee include learners who missed assessments due to illness, disruptions and political campaigns, cribbing, emergencies, and any other matter that hampers the smooth running of examinations and other forms of assessment in a school. They ensure that all assessments are credible, and as such assist the principal in terms of quality assurance. The effectiveness of these structures enable him to focus more on curriculum delivery which as he has said, is close to his heart.

Instructional resources

Having explained the structures he relies on in his school, which include the SGB, RCL, SMT among others, Gomolemo went further to allude to the limited resources which often hampered their smooth and effective mediation of instruction. Availability of English home language teachers remains a serious challenge, but physical resources are also a rare commodity. These include items like teaching aids and all other learning and teaching material they need. Retrieval of textbooks is also affecting their reserves in a big way. However, he was not happy that the school did not have a hall:

We do not have a school hall; you saw on Friday when we had those learner achievement awards. We normally hold them in the open at the assembly. This makes it difficult even to arrange learners properly. We had few cases of ill-disciplined learners.

On the other hand, he was happy with the way his school was built. He confided that the arrangement of classroom blocks made it easy for him to monitor and walk around without chasing learners who could have been hiding behind the classrooms. They

only used one entrance and one exit, and once learners were inside, they closed them all.

Managerial resources

His leadership and approach blends well with Hopkins and Jackson (2003:100) in their assertion that all teachers have the potential and entitlement to contribute meaningfully towards leadership. “It is therefore important that their leadership capacity be unleashed and harnessed in the interest of the school as an organization.” (Harris, 2003b:78) Furthermore,

it is the responsibility of the hierarchical leaders to facilitate this process by creating the requisite organizational conditions and climate and by providing the required support in order to unleash the kinetic and potential energy of leadership (Hopkins & Jackson, 2003:100).

Even though he only had one deputy principal, Gomolemo ensured that responsibilities were shared among all educators, with and without positions. Hence he encouraged all educators to belong and participate in the PLCs in order to harness their skills and share good practices. According to Harris (2003), the notion that leadership is not the exclusive domain of any one person is one of the most congruent findings of recent studies on effective leadership. It is for this reason that Gomolemo preferred sharing responsibilities with all stakeholders in his school. This bodes very well for him and enables him to strike a fair balance between his instructional leadership and managerial tasks of the school. The school's infrastructure is strong, clean, and well organised. There are very beautiful sporting facilities, which he is very proud of. These are still new, and seemingly well maintained.



Figure 4.17: The handing over of the sports facilities. (Photo by T J Tshabalala)

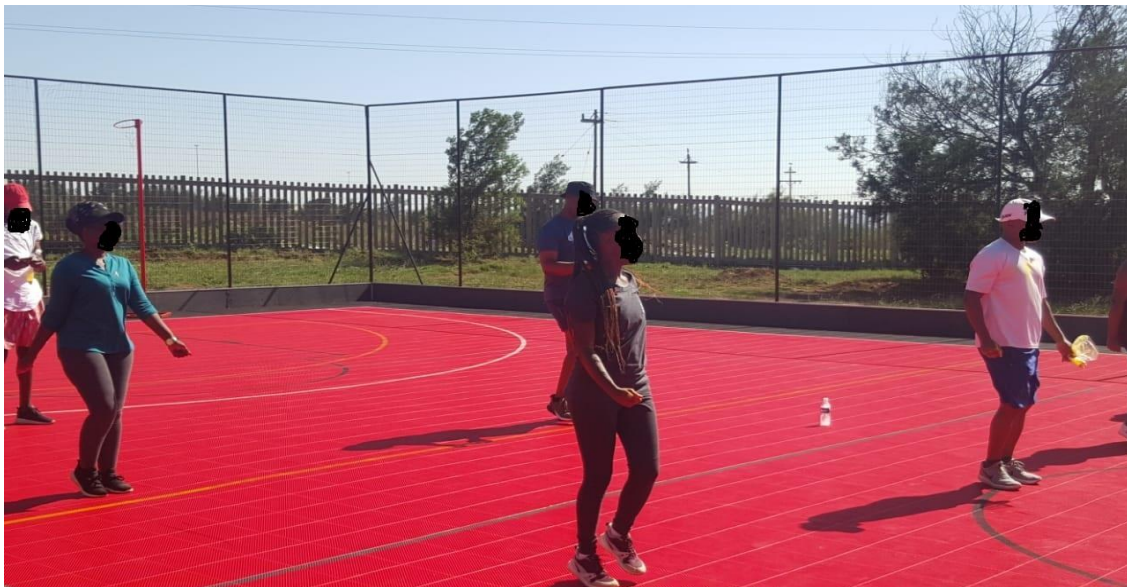


Figure 4.18: Staff members playing after the handing over ceremony (By T J Tshabalala)

4.4.3.3.3 Day-to-day practices to achieve a balance

Daily practices

Curriculum delivery

Gomolemo recognises the importance of his role which he coined as “*managing in general*”. At the core of all his duties is curriculum delivery. He said:

With the teachers it goes back to our core business, teaching and learning. We must teach the learners and we must work together as a team because I believe

in teamwork. I can't do it alone, I need the other people to help me to take this school forward, and I have seen the results of that.

Leading by example is his mantra, which in a way was influenced by the fact that the school had not had a deputy principal for some time and he had to double dip and function as both. He emphasised that it would be futile exercise on his part to issue instructions which he himself would not execute. This is in line with Yukl (2010)'s assertion that leadership is a process where people are influenced to understand and agree on what should be done, how it should be done, and the processes involved in achieving the shared objectives both as individuals and a collective. This is how he put it:

I must lead by example; I can't say people must do yet I don't do. Some of the things I must be able to show them how they are done.

There was a meeting one morning (briefing), where he actually demonstrated how teachers were expected to capture marks on SA Sams programme after assessing learners. It was a new thing he was introducing, where educators were now expected to do capturing of marks themselves, instead of sending their handwritten mark sheets to the Administration Assistants for capturing. He used a data projector which he linked to the SA Sams programme via Wi-Fi and was explaining every step, up to the analysis of results. I could see that teachers were following, considering the questions they asked as he was presenting. Although it was going to be a new thing to them, teachers showed a keen interest to know and understand. I later asked him why he was introducing that system at that time, and this is what he said:

The department wants educators to be involved in this programme (SA Sams), and they encouraged us to ensure that we mediate it to educators. It will make it easier for them to immediately know their averages after assessment. And I think this will also relieve the clerks of the pressure.

I viewed this as an opportunistic stride on his part because the mid-year examinations were around the corner, and he strategically wanted it to be the starting point, which would give him an indication of their competence before they reach the end of the year exams. A strategic move indeed.

This principal was at pains to explain the importance of making every minute count in his school. Mr Gomolemo emphasised that it was critical that principals did their best to protect teaching time, because many activities happened at schools and those could derail the existing culture of teaching and learning. He went on to cite an example of late coming:

Earlier on I indicated that we need to protect teaching time. Now it's winter and learners are coming late. When they arrive after the first period, they don't know what the teacher said in class because they were late. That is why I want teachers to be at the gate to do gate control. During parents meetings I also remind parents to ensure their children are here at 7h30, because if they are not present at that time, when the register is marked, they are absent.

His sentiments corroborates findings of authors like Blasé and Blasé (2000) and Hallinger and Heck (1998), who assert that the principal must give more focus on classroom instruction. Another example he cited was the way they reacted to recommendations from the Subject Facilitators' reports:

What we normally do after the visit is, we call the teachers in that particular subject and go through the report with them. We look at the recommendations, and what needs to be corrected. We take these findings and recommendations one by one and explain to them, and then we ask them for suggestions to improve.

The suggestions and recommendations coming from these discussions are then compiled into a plan which has time frames, as Gomolemo asserted,

There has to be a time frame and follow-ups must be made, because a problem cannot be identified and then be left like that.

He believed this helped always to keep track of what the teachers are doing, and how far they are with syllabi coverage, because these reports look at various sections of their work. The HODs are then expected to monitor the teachers' progress so that the next time when the facilitators visited the school, at least there had to be an improvement. On the other hand, these reports also serve as capacity building for teachers, especially the novices.

These scholars believe the more the principal spends time on instruction, the better for a whole range of factors. This does not mean that the principal should always be in class teaching, but the keen interest and focus on challenges teachers experience, and scrutiny over learner performance are critical. It is not expected that the principal should know or be a master of all subjects (Hallinger, 2003), but responsibilities like supervising and evaluating instruction, allocating relevant staff, providing resources, and monitoring students' progress are critical. All these functions fall under management side of the principal's leadership. He stated,

In terms of instructional leadership, I think it's almost the same as management, but instruction in my understanding is more of supervising learning and teaching. We must respect the teaching time because the district office has even checked our timetable to ensure it is in line with the notional time.

Mr Gomolemo spoke boldly about maintaining high visibility in the school. He indicated that he does not like leaving the school during normal teaching hours because some of the staff members stopped working immediately when they realised that the principal was not there. He explained it like this:

I believe in going to the district office after school, not during school hours, because that's where the problem is. If I have to leave the school, there can be chaos. So my being at the school at all times helps.

This kind of thought indicates that the principal understands the calibre of some of the teachers in his school, and those are the people who do not give him rest. However, he was quick to point out that there are a number of good teachers whose teaching he enjoyed as he went around the classrooms. He continued:

And it makes me happy when I take my rounds and the school is quiet as if there are no learners in the school. That makes me very happy and to see teachers, you know ..., teaching in the real sense of it. Teaching ... and seeing learners participating, that makes me very happy. It may not be all teachers, but almost in all of them I see that.

Monitoring and support in a healthy learning environment

Mr Gomolemo likes cleanliness. He is physically well built and always beautifully dressed. The school is generally clean, and he encourages everyone to keep it clean.

Even the learners follow in his footsteps in terms of wearing their beautiful school uniform. A conducive environment is very close to his heart, and this includes the learners' toilets, which he believes also promote good health habits.

Amongst the many tasks he performs, he mentioned mainly those that drive the curriculum, where he controls books and give immediate feedback to teachers, learners and parents, ensures adherence to both the school and departmental policies, and reviewing some of the policies annually and whenever necessary. Attending to safety issues is also very important to Gomolemo, considering that the school has had a few incidents of ill-discipline where learners were involved in some social media scandals. He said:

I want our staff room to be conducive for everyone, to be warm. They must feel that they are at work when they go for break time and they enjoy a cup of tea or coffee. I want the staff room to be that type of place, like I was saying that the other time I wanted to mount a TV for them, so that they can relax and forget about what happened in class.

While he keeps a very sharp eye on teaching and learning, he also empathises with teachers as they grapple with challenges in their different classrooms. He mentioned that sometime they stayed at school till late, trying to cover lost time and complete certain tasks, especially when they have deadlines to meet. Then he would organise incentives like a breakfast or lunch for all staff as a reward for good work and also to foster stronger bonds. He explained that this had a number of positive spin-offs, where some of those who had issues began to open up and discuss their differences, resulting in overall harmony amongst staff members. Cordial relationships are very key to Gomolemo and he uses this to consolidate his management strategies.

Mr Gomolemo also mentioned something that makes him unique, which is the fact that he randomly does unannounced class visits, where he would go into a class and observe the teacher in action, without any interference. At the end of the period he would then discuss his observations with the teacher concerned:

You know ... at times I'd go into a class and just sit for a few minutes and listen to a teacher. I know it's difficult for them because they'll be shaking and nervous,

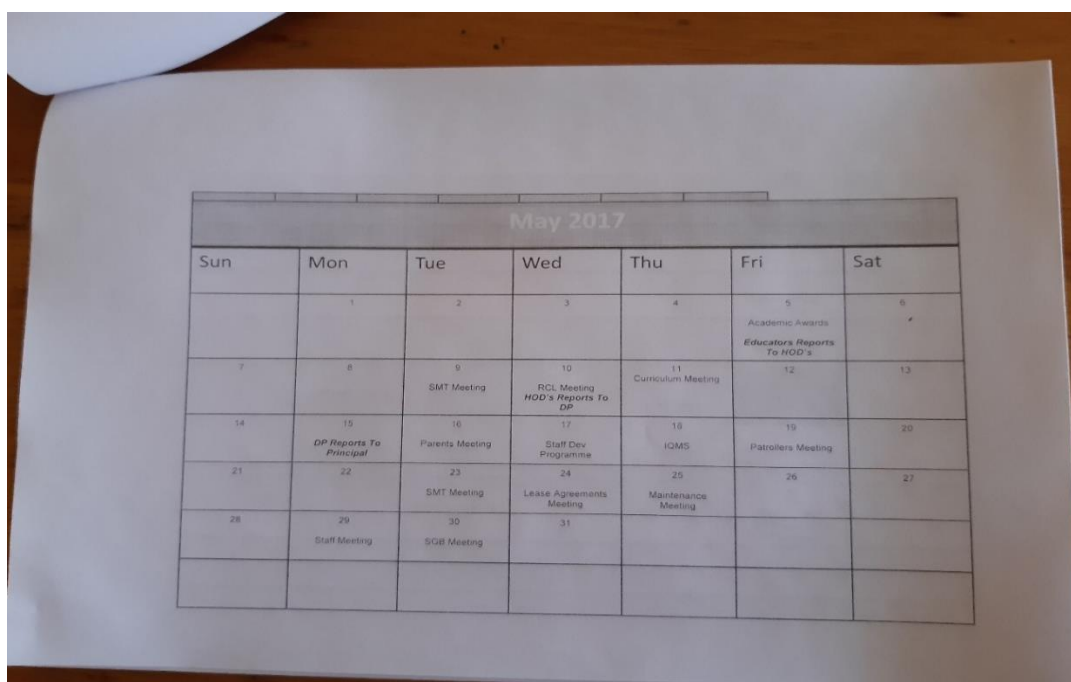
but I always tell them that it is part of IQMS. I don't even have to tell them when I am coming.

Planning as part of day-to-day activities

One thing Gomolemo does and kept on referring to during our conversations was planning. He coordinates all school activities into a management plan for the whole year. This, he said, enabled him to monitor and protect teaching time. He acknowledged that it is not always easy to stick to the plan because of numerous disturbances like the district office, which would call meetings and workshops which clashed with their dates, visitors to the school, who needed some time to engage either with learners or educators, and most worrying of them all, community unrests and protests over lack of services including labour strikes.

So I always try to make sure that whatever that I have planned to do I do, even if it's not always hundred percent of what I would have loved to do. Some activities you do not even do because of clashes with other important engagements.

He indicated that he was supposed to have called a meeting with the school patrollers, but due to a tight schedule, that meeting never materialised, because there were other activities that had to be prioritised, even though they were not planned for.



May 2017						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5 Academic Awards Educators Reports To HOD's	6
7	8	9 SMT Meeting	10 RCL Meeting HOD's Reports To DP	11 Curriculum Meeting	12	13
14	15 DP Reports To Principal	16 Parents Meeting	17 Staff Dev Programme	18 IQMS	19 Patrollers Meeting	20
21	22	23 SMT Meeting	24 Lease Agreements Meeting	25 Maintenance Meeting	26	27
28	29 Staff Meeting	30 SGR Meeting	31			

Figure 4.19: An extract from the year plan (Primary data)

Facing the obstacles

This school has had a fair share of its own challenges, moving from one scandal to another. The principal shared with me a number of very sad stories which impacted heavily on him as the leader of the institution both socially and psychologically. Apart from the story he related here earlier, they had another big one where a girl learner was video-taped posing naked and having a sexual encounter in the open fields with a boy from another school. The video went viral in his school, and affected the learner so much that she nearly committing suicide. Gomolemo, who was close to tears, said:

We once had an incident where one of the learners posed for her boyfriend who was taking pictures of her private parts and later had sex in the fields.

His school was the talk of the whole township, and this generated certain attitudes among the community members which impacted on the learner enrolment in the school. When he arrived at this school, there were about 400 hundred learners, and due to such scandals, he had to work very hard, fighting against very strong forces just to defend and redeem the status of the school in the community.

Gomolemo was born and schooled in the same township, and this gave him an advantage when dealing with the misfortunes of the school. He told me that he was the mouthpiece of the school and strived at all times to promote the school wherever he got an opportunity. It was not surprising that learner enrolment steadily improved and the school now had more than 800 learners. I saw him becoming very emotional when we discussed the challenges he faced and how he was able to knock them down one by one.

Impediments to effective instructional leadership

This school is an English-medium home language secondary school based in a township. It is unusual to find a school in the township offering English as a home language. Most schools offer African languages as home language, depending on which languages are most popular in the area. Most of the teachers who were declared in excess at other schools were redeployed to this school, because in the beginning the school did not have such a post. This, according to Mr Gomolemo, created a serious problem because in most cases of redeployed teachers, one would find that

those are the problematic teachers at their schools, and not the best; hence, they were redeployed.

Another challenge has to do with the availability of English home language teachers. Gomolemo lamented the scarcity of such teachers and went on to indicate that he was fortunate because he had a good working relationship with some of the schools in town and suburbs who were able to advise and assist him to secure some of the white teachers who were able to teach the language. I was able to see these teachers and they appeared to be comfortable to teach in a township school. However, Gomolemo explained that to secure English home language teachers was a nightmare indeed. His lamentations went like this:

As a school, remember that I told you we offer English Home language and Afrikaans additional language, which is different from other schools. And I had to make sure that I get teachers who would be able to offer those subjects, because I didn't want to lose the confidence of parents who wanted to take their children to town schools. I went to schools in Randfontein and Krugersdorp, looking for teachers. So that makes our school unique and different from other schools.

The school admits most of the learners from primary schools in town and suburbs, and their parents expect conditions to be the same as those in town schools. That is the reason Gomolemo is so obsessed with a conducive environment, which includes attractive grounds and infrastructure, not leaving behind effective teaching and adequate learning resources.

Tools for success

The driving force behind all activities of this school is excellence, as explained by the principal. Mr Gomolemo eloquently related the path they follow to achieve their success with pride and sense of personal accomplishment. When talking about excellence, he said:

I always strive for excellence, even if it's difficult, but I strive. Excellence, because I believe this is a school where proper teaching and learning takes place. And I want us to excel in everything we are doing.

He also conducts accountability sessions after issuing learner progress reports, at the end of each term to all the grades:

I told them that, we know that the people who are used to accounting are the Grade 12 teachers because the school will be measured with their results. But we forget that the very same Grade 8 learners are our future Grade 12s. So if we don't lay a solid foundation in the lower grades, we will have a problem in the end.

He emphasised the importance of accounting sessions especially in the lower grades and also explained that their experience taught them that educators deployed in lower grades have become very productive, since they started to account for their performance. Another point he highlighted was that the teachers teaching lower grades should include some of the best in the school. This is how he put it:

We also look at the people we allocate to the lower grades. One will say the HODs must teach senior classes only, but to me, the HODs with their managerial skills are of great assistance there because they will know how to deal with these learners and their transition from primary to secondary school. So we normally give HODs Grade 8 classes and some in the FET phase.

These are meant to establish the success or failure of their teaching and learning programmes, and attend to challenges in the shortest possible time. He told me that he was very careful with the teachers he allocated to the lower grades, and that they included SMT members. His intention is to build a solid foundation in the lower grades, which will enhance Grade 12 learner performance.

Programmes that bring about attainment of goals

Almost all teachers in this school are deployed in different subject committees as subject heads, and this gives everyone a certain level of responsibility. All reports from subject facilitators are shared amongst affected teachers and recommendations are implemented with strict target dates for completion. He also mentioned control of learner books by HODs, DP, and the principal himself. He stressed the importance of immediate feedback as follows:

Like I said before, when I do monitoring; I make sure that I give immediate feedback. I don't delay feedback because that's very important. And this is what I always say to the SMT. Feedback helps them to improve on their work.

Immediate feedback is also extended to teachers where they are mandated to return learner books after giving tests in the shortest possible time, he went on to say:

I'd even say to teachers if you take books for marking, do not keep books for two or three days, that's too long.

This matter is taken seriously, and they have even included it in the school management plan, where teachers are given a certain period to give feedback to learners after assessing them. Gomolemo stressed that this system applies across all grades, but his main focus was on matric, which he said is the face of the school. He admitted that schools are judged based on Grade 12 results, and that they do not want to be identified as an underperforming school.

Meeting targets

It is for the same reasons that a special programme is run for all Grade 12 learners in this school. Every Grade 12 teacher is expected to do his/her own target setting in their different subjects. These targets must be in line with the provincial and national targets. He said:

We also have strategies for improving performance for every teacher in Grade 12 in particular, based on the previous year's results. They must tell us how they're going to improve the results. It doesn't matter whether the person got 100% in Setswana or maybe English or LO. In that case we say ... yes you got 100%, but in terms of quality we were not happy.

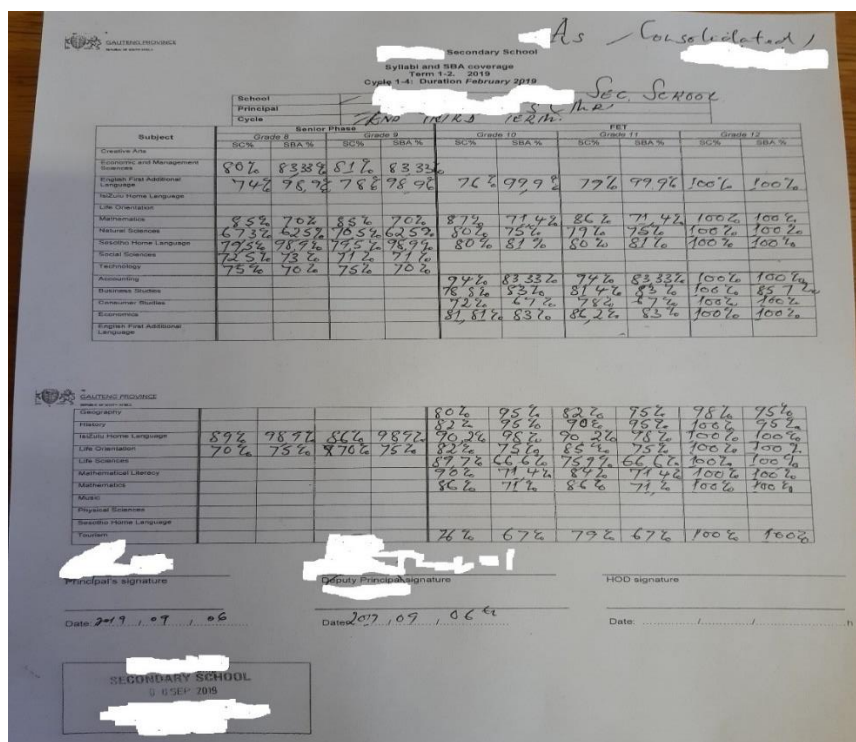


Figure 4.20: Consolidated analysis of results

The emphasis here is that individual teachers have to ensure that all learners assigned to them according to various subjects in the school should pass, and pass very well. He went further to relate the importance of sharing the pass requirements with both learners and their parents, and make them visible on the notice board in each of the Grade 12 classes. He said this keeps the motivation high among his learners. He explained it as follows:

So what we did specifically for them is that we got this document from the district office that indicates the pass requirements for higher certificate, diploma, and bachelor. We explained all this to learners in class. All these things that we explained to them, we also put at the back of their class, so that they can look at it time and again.

This is done to show learners that to get a bachelor entrance certificate is not difficult, and if they know about it, it can be achieved. Gomolemo's Grade 12 programme also includes extra classes every day after school and on Saturdays, where teachers take advantage of the time to focus on those subjects in which the school is not doing well.

Stakeholder interactions

Apart from matric results and teachers, he indicated that the success of this school is also driven by the general assistants (GA) and the administration staff (AA). Mr Gomolemo believes in collective wisdom; hence, he recognises the importance of the stakeholders and appreciates their role in the school. His statement was clear:

We don't only focus on curriculum. But there are other stakeholders that play a part in our success. The administrators are doing a great job and are assisting the school to move forward, the GA's keep the classes and grounds clean. We don't want learners to learn in dirty classes.

This attitude is extended to the food handlers and patrollers at the school gates. He recognised their importance and contribution towards making this school a centre of excellence. Other stakeholders like the SAPS, Departments of Health and Justice, and Faith-based Organisations are also active in the school, and are given space to assist in different areas of need. These include drug awareness campaigns, health and teenage pregnancy awareness programmes, visits to prison in order to rehabilitate those who are involved in criminal activities, and spiritual part where different pastors visit the school to share the word and motivation for learners, and to inculcate moral regeneration.

The matric programme run at this school is also part of the provincial initiative called SSIP, which is the secondary school improvement project. This project runs across all Gauteng secondary schools, and takes place on Saturdays and school holidays. Expert teachers from different schools are identified and deployed to centres where learners are grouped into clusters. These centres are managed by the principals, mostly those of hosting schools. Other principals from various schools have a duty to assist with monitoring attendance of their matric learners and making follow-up when they return to their schools.

Achieving balance

Mr Gomolemo cited planning as one pillar of his strategy to achieve balance in his work. He allows various structures in his school to draw up their own plans which he collates into one comprehensive school year plan (see Figure 4.15). The plan is then

broken into weekly, monthly, and quarterly activities, each with its own operational plan. Curriculum delivery, as he said, was priority, since he was very protective of teaching time.

The plans also allow the structures to function in a coordinated way, as he is able to follow up on their activities, thus providing oversight. While his school is still growing, with only one deputy principal, it was similar to other schools in terms of functionality and attainment of goals.

4.4.4 The story of Mr Sonny

4.4.4.1 Presenting Mr Sonny – “The loud mouthed exemplary leader”

By excellence I mean, when I'm doing something, I'm pushed by that little inner voice that says, I don't want to fail, but not only fail but also want to produce the best.

Mr Sonny grew up in Sharpeville and started his teaching career at Bokamoso secondary school (not real name) in a township of Sebokeng in the old Vaal triangle, in 1986, where he spent three months only as a temporary teacher. He then moved to the high school he had attended, Tsela-tshweu High (not real name) in Sharpeville, in the same year and took up a teaching post, which was still a temporary post. He spent another three months there and later moved to Fundilizwi Secondary School (not real name), where he assumed permanent status. In one year, he worked at three schools, which shows that it was not easy to get a teaching post in those days.

It was not long after having settled at Fundilizwi Secondary School when he was recognised for his hard work and dedication that he was promoted to HOD in the Social Sciences department, and then after five years, to deputy principal at the same school.

He confided in me that from college he had been a very ambitious person who enjoyed challenges, and believed in his skills to teach History. He was then appointed principal of his current school in January 2010. Asked why he chose this school he said:

I chose this school because I learnt that for the past five years, that is 2005 to 2009, the school has been underperforming with regards to matric results. It never achieved anything above 30% pass rate for the past five years ... I

therefore felt that I would unleash my skills, knowledge and expertise to help improve the results.

4.4.4.2 Sonny High School profile

Sonny is the second principal of the school after its founder and his predecessor left in 2009. The school was founded in 1992. It is a no-fee, quintile 1 school in the poverty-stricken township of Boipatong. This school has 26 educators and 6 public service appointments, which includes administrative assistants and 2 deputy principals. There are 4 HODs for various subject groupings, and the learner enrolment is 823, with 26 classrooms. The SGBs involvement is just average and the same goes for parents. The school's results have improved since this principals' arrival at the school, and over a period of five years increased significantly from 64% in 2013; 2014 = 83; 2015 = 94; 2016 and 95.7% in 2017.

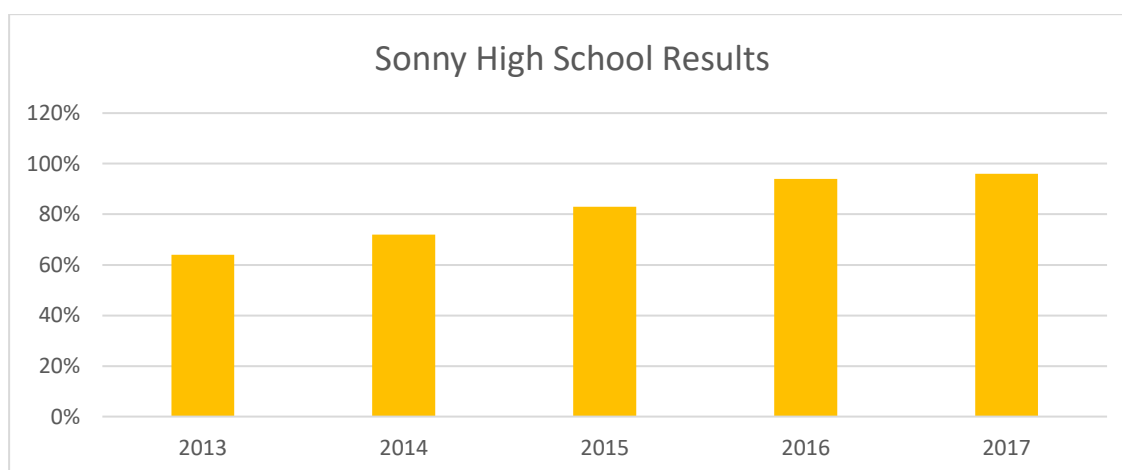


Figure 4.21: Graph depicting Grade 12 results over five years

4.4.4.3 Narratives

This principal vividly remembers the situation when he arrived at the school in 2010. The whole SMT and staff were very upset, angry, and divided, after there was an administrator who was sent by the district office to take care of the school after the first principal left. They had demanded the removal of the administrator. The morale of everyone in the school was very low, late coming especially of learners was appalling and disgusting, and learner performance was low. This is what he said:

On my arrival at this school in 2010, I tried to look at the academic performance of the school and in particular the Grade 12s and my findings were that for the past 5 years before my arrival, the school had never achieved anything above 40%. Pass rate would vary from 27%, 29%, 30%, and 39%. I felt that it was a real concern that needed my urgent attention, and I decided to come up with ... eer ... a quick turnaround strategy for the school.

He found himself in a crossfire, where there were divisions and camps within the school. The culture of teaching and learning had literally collapsed. It became pretty obvious that the task ahead was going to be rocky and steep. One of the very first things he did was to work on learner discipline, by developing classroom rules and later code of conduct. He also set up teams to monitor late coming and gate control, because it was a thorough fare. Anyone would just enter the school yard and leave without being recognised. Therefore he sought to tighten security at the entrances.

On the other hand, he saw the need to also work on the morale of the staff, by inviting motivational speakers to address the staff on various topics, on moral regeneration. On this he said:

Like I said, we have a few community organisations which have come to offer their services to us. There is this one which constantly comes to motivate our learners and educators, actually, the whole staff. They are really making a difference I am particularly impressed with the way our learners respond. But you know ... the morale needs constant boost, otherwise it quickly gets forgotten. I see this a lot among teachers.

He also started morning and afternoon extra classes for Grade 12 learners every day of the week, Monday to Friday. He also indicated to me that his day starts at 7:00 in the morning and often ends at 9:00 in the evening. Extra classes were also introduced during school holidays and weekends.

Table 4.7: Summary of themes, sub-themes and categories

No.	RESEARCH QUESTIONS	THEMES	SUBTHEMES	CATEGORIES
4.6.1	What are the policies that guide the work of school principals in South African schools and how do principals make sense of these policies?	Policies that guide the work of principals and how they make sense of them	The policies making sense	Departmental policies School policies
4.6.2	What structures and resources do principals rely on to carry out these policy guidelines in their dual mandate of management and instructional leadership in schools?	Existing structures available resources	Existing structures	Managerial structures Instructional structures
			Available resources	Managerial resources Teaching and learning resources
4.6.3	How do principals go about their day-to-day practice of leadership and management of schools and how is the balance achieved, if at all	Day-to-day activities that promote a balance	Everyday practices	Curriculum delivery Stakeholder engagement Meeting difficulties - Impediments to effective IL Secret weapon-success factor
			Balancing act	Leadership Style Proper Planning Beyond the call of duty Meeting set targets

4.4.4.3.1 Policies that guide the work of principals and how they make sense

Making sense of policies

Mr Sonny was very open in his responses to the interview questions and always gave elaborate explanations. As mentioned by the other previous participants, he is very much aware of his mandate as a school principal, and that is the fact that he has to ensure policy implementation and compliance. Upon his arrival at this school, he quickly realised that the grass was actually not green as seen from a distance. He quickly had to deal with ill-disciplined learners and collectively with other stakeholders drew a code of conduct for learners which was key if he had to correct the behaviour and conduct of the learners in the school.

School policies

He engaged the SGB and the SMT in the development of other key school policies, which include the admissions, religion, safety, and finance. He sadly indicated that the

policies were there before, but no one seemed to know about them. The hostile environment he found, made him to grow thick skin very fast and got down to work.

Learners' code of conduct was therefore amongst the first policies he implemented. He said this was because learners were completely out of hand, and teachers were helpless. Sonny explained like this:

I encouraged the SGB and the staff to review the code of conduct for learners, which we drafted and circulated copies thereof to all learners to give to their parents. Parents were then expected to sign the copy after reading and return it to school. The code of conduct spelled out clearly what were the expectations of the school, and the consequences of not towing the line.

His efforts fortunately received overwhelming support from parents who needed such a change in their school.

Departmental policies

He did not complain about many policies of the department of education, except the one about modulation of Grade 11 learners, and the one on promotion and progression of learners, as will be seen in his narratives. Mr Sonny was not at all happy and did not agree with the department about allowing the matric learners who had failed a certain number of subjects to progress to Grade 12. And when they still do not pass during their Grade 12 year, then the principal must call the parents together with the learner and advise them not to write all subjects, but only those they were doing better, at the end of the year. In this way a learner would write about three subjects and then write the rest the following year. The attached extract explains the procedures with regard to progressed learners.

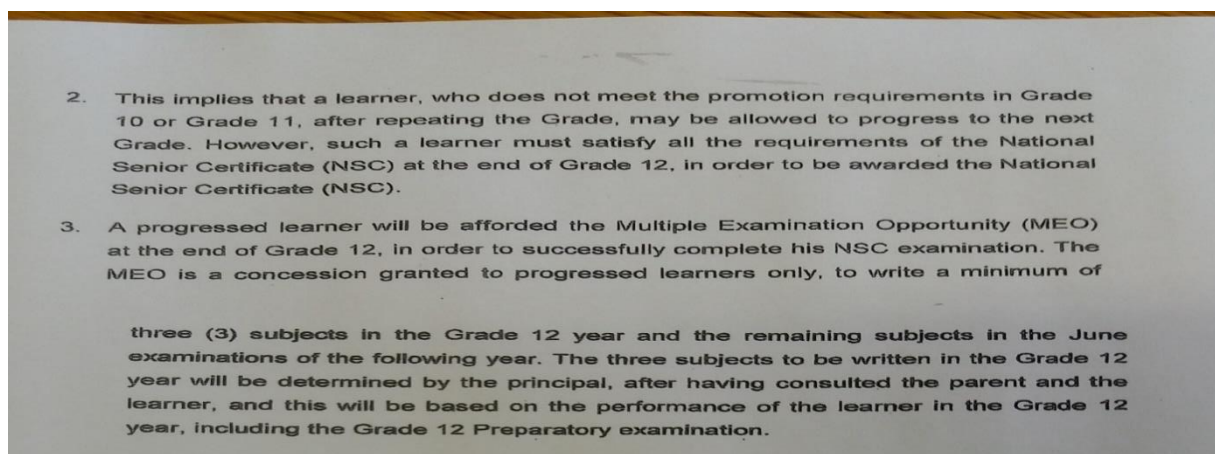


Figure 4.22: Extract from the MEO circular (Primary data)

His dissatisfaction is based on the fact that the matter is left to principals to handle with parents. He lamented that many parents were against this and would have it very difficult convincing them together with the learner to do matric over two years. Here is how he expressed his concern:

.... and the issue of modulation, so that learners are progressed to Grade 12 and when they don't perform well in the prep exams, the department gives a guide to say such learners should be modulated. It's a big effort to convince parents and the learners that they are not supposed to write full exams at the end of the year, and that they are only supposed to write exams in those subjects they have passed, and the rest they will write the following year, it becomes a challenge.

He pointed to the challenge of teaching learners who had actually failed but were promoted because of the departmental policy which allows for such learners to be progressed under certain conditions. This principal feels betrayed by such a policy, which according to him does not seem to support their efforts to promote excellence. He went further:

The other challenge you know is this one of departmental policy like this of progressing learners to the next grade. It's so difficult to teach a learner who has failed a grade and the learner is put to a higher grade, you know. To be able to reach that particular learner is so difficult, it's so difficult ...

Teaching and learning

His answer to the question about teaching actually took me by surprise:

Err ... I'm teaching History in Grade 12 and now of late I have taken one of Grade 11 classes. The teacher there was struggling with these learners, so ... I decided to take it over.

He is hands-on in terms of subject teaching and what is more interesting is that he has also taken a second class. Teaching Grade 12 comes with huge responsibility; however, he was able to explain how he gets his way around all his responsibilities. He also shared with me that he has always loved teaching and produced good matric results in the past while he was still a teacher.

He acknowledged the pressure he has as a principal, but highlighted reasons why he found it important for him to teach. He put it like this:

I must say, in teaching these learners helps me a lot, to know them and as I interact with them, they also know me and understand a little bit what type of a person I am. Again as a principal when my performance is good, for instance, in Grade 12, I'm used to producing 100% pass year in and year out, when my performance is good that serves as motivation to the teachers.

Sonny is convinced that these reasons propel him to do even more; hence, he took another class in Grade 11. He demonstrates exemplary instructional leadership, by leading from the front, as he explained:

When I say let's work towards 100% pass in our classes and subjects, they see you as somebody who is able to preach what he is doing. Unlike looking at me as somebody who is, you know, sitting on a cosy chair and always calling the shots, always demanding 100% pass.

His commitment to pushing his educators and learners to exert themselves, and also being the exemplary leader does not come cheap. He admitted that he often found himself under tremendous pressure. Here is what he said:

It is not easy for one to be a principal and teach at the same time. For me to do certain things as you can see on my table, you see a hip of History books. I need to prepare, and make sure that at least I'm ready for the Grade 11 and 12

learners. This will enable me to attend to any problem that may crop up at school, before I attend to my periods.

Looking on the side cabinet of his office, I could see stacks of learner exercise books which were waiting to be marked. He explained further like this:

I don't have the comfort of marking during school times. I can rather do it after school or at home.

When probed further to establish if he has time at home, this was his response:

I believe it really disturbs; you know. It disturbs and destabilizes the family relations. Because my wife would like to have my attention at times but only to find that I'm glued to schoolwork that I'm expected to complete. So it is really not easy. It takes up more of my family time.

According to Blasé and Blasé (2000), teacher perceptions included the fact that effective principals were those that displayed teaching skills and techniques in classrooms and conferences. These principals were more involved and interacted frequently with students, which in turn resulted in positive behaviour all round. Sonny epitomises these findings which he aptly shared during our interviews. These findings further strengthen his belief that going into class and teaching allowed him to gain insight into the challenges faced by his staff, and also getting to know his learners as he said above.

He went further to explain that his involvement in classroom subject teaching has also enabled him to understand the tone of the school, from the teachers and the learners. He is able to identify with the challenges they face daily in their classes because some of the troublemakers are also taught by him. He went further:

It also gives me understanding of the tone of the school and also to understand better, the challenges that are faced by err, teachers because I'm also in class. I'm meeting the same learners who are having ... you know ... challenges, difficulties in understanding various subjects, because my subject will be one of the subjects they are doing ...

4.4.4.3.2 Existing structures at the school

There are two deputy principals at this school, and the principal explained that he did not believe in doing things alone. He preferred distributed leadership which he believed enabled him to cover more work in the shortest possible time. This is emphasised by several scholars who assert that school principals perform many functions, leading to many authors admitting that these functions cannot be effectively executed by the principal alone (Leithwood *et al.*, 2009; Manin, 2007). Hence, Mayrowetz (2008) believes that it can be in their best interests to share and distribute some leadership roles to other members of staff.



Figure 4.23: Meeting of the Grade 12 teachers with the principal (Photo by TJ Tshabalala)

Managerial structures – Functionality and role of individual members

Sonny is therefore able to achieve more with the resources he has at his disposal. Like the other schools, he has divided the school into sections and blocks which are then headed by the members of the School Management Team (SMT) who then report to him. He explained like this:

In regards to the institution, I realise that I cannot do it all alone, so I delegate to my deputies, HODs, you remember I spoke about that earlier, where I said there is a deputy for FET and the deputy for GET, the HOD for particular grades. Then

all of them have their different responsibilities. And my task is just to co-ordinate and monitor their activities.

Mr Sonny also praised the SGB for their support towards his efforts. He mentioned that they often volunteer their services to look after learners during the night when they attend study and extra classes. Their involvement revolves around the many other roles they play within the school, as he said:

I'm so grateful to our SGB for convincing parent community to pop out R100.00 as an annual fundraising contribution to the school. So that is the money that is assisting us to go on as a school, because other funds that we get from the department you know ..., are ring-fenced ...

This corroborates findings of scholars like Cox (2005); Jimerson et al., (2006); Nettles and Herrington (2007), who aver that parents and the community can also play a pivotal role in improving learner performance, provided they are strategically roped in by the principals.

Structures for instructional leadership

Sonny also explained that there are other structures like the SAT and the SBST which are responsible for assessment and learners with barriers to learning respectively. He believes these structures are doing a very good job in the school, and attributes the success of the school to them:

I have ensured that one of my deputies is the co-ordinator for SAT (School Assessment Team), so that you know ... so that ... we know assessment is the backbone of the school, assessment is there to prove or give results of where is the school in terms of performance.

The other deputy is put in charge of the LTSM, where they see to the selection and procurement of all learning and teaching support material, as he explained:

So I have strategically put the other deputy to LTSM, you know, textbooks for learners and other resources are playing a very important role in ensuring that curriculum is delivered. I trust this committee to identify all the needs and procure as and where needed. The LTSM team is headed by one of the deputy principals, so ... I rely on his judgement and sincerity in such matters.

Involvement of educators (without positions)

Some of the duties are allocated to HODs and other members of the teaching staff, and one important point he highlighted is the ICT co-ordinator, who is an HOD. Other bases are covered by a number of committees established within the school, like the timetable, sports and culture, condolence, entertainment, maintenance, to name a few. The other structure that is very active at this school is the RCL, which assists with late coming of learners. They are responsible for recording and reporting all late comers to the committee in charge of gate control, late coming and uniform. He told me that he holds regular meetings with them to discuss learner issues including some of their demands which include entertainment and matric farewell.

As I told you that I teach these learners, so this enables me to know them and they also know me. We have a mutual relationship which I use to win those troublemakers. I have brought the RCL close to me, such that whenever they want to discuss anything with me, they don't hesitate to arrange a meeting. And I make time to listen to them .. eer ... their concerns and so forth.

In the study by (Louis *et al.*, 2010) it was discovered that schools where principals created an enabling and encouraging environment and climate for teaching, the teachers were very supportive of the principal. This gave rise to such principals achieving high scores in their performance evaluations. The same happened with principals who inspired their teachers and staff to lead in various areas of their operations.

Scholars from the University of Washington (Honig *et al.*, 2010), agreed that most of the effective principals paid more focus and , quality of instruction. This they did by inculcating and encouraging high expectations among teachers while, on the other hand, ensuring constant support to them. They go further to highlight the importance of the principals' visibility in the school and their ability to observe teaching and learning in progress, and at the same time giving immediate feedback to their teachers.

Available resources

Teaching and learning resources

In common with similar schools in townships, Sonny High also experiences a lack of resources, which range from teaching and learning aids to infrastructure deficiencies. Teachers are their main resource and as Sonny intimated: *“We make sure we choose the best teachers whenever we have vacancies.”* He believes teachers are central to the success of his school. Common problems like learners not returning textbooks loaned to them, lost or stolen books are also experienced. However, he explained that they involve the SGB effectively to track all those who do not return the books, and wherever they cannot retrieve a book, the parents have to pay. They seem to succeed in their efforts because their retrieval rate was 80%. This is how he put it:

After learners have written their various subjects at the end of the year, the SGB appoints some parents who will come to school and help with collecting textbooks that were issued to learners during the year. If any book has been lost the SGB will refer the learner and the parent to admin office to pay, or make arrangements to pay later.

Managerial resources

Sonny enjoys a full complement of the SMT, and is able to deploy them wherever there is a need. He also indicated that they initially had no guard room for the gatekeepers and patrollers, and they roped in the SGB, and were able to build it from their own funds:

We have a maintenance committee which I made sure it was functional and we were able to request the head office to come and do some electrical repairs in the school. And we also made sure that our bathrooms and showers were functioning properly. The biggest challenge we have now is theft and burglary. Not long after these were repaired, we found the water pipes ripped off and some electric cables stolen. Police came, took statements, but no arrest till today.

They also got new bathrooms and showers built out of funds they raised from their own initiatives. These facilities were very useful to their Grade 12 learners when they held camps at school while preparing for examinations. They did not have enough storage facilities, and they worked hard to erect several storage rooms, making use of

spaces under the stairs of their double story sections of their school buildings. This school appeared to be stable and managing well with little resources they have. When talking about improvements in the school, he was very casual as he explained:

We try to trim our School Development Programme into annual programmes, whereby we prioritise areas where we need to improve. For instance, we were running short of storerooms where we can keep some of the equipment that are no longer used, and we were able to build two storerooms. And we didn't have a guard house for our patrollers, and we built it.

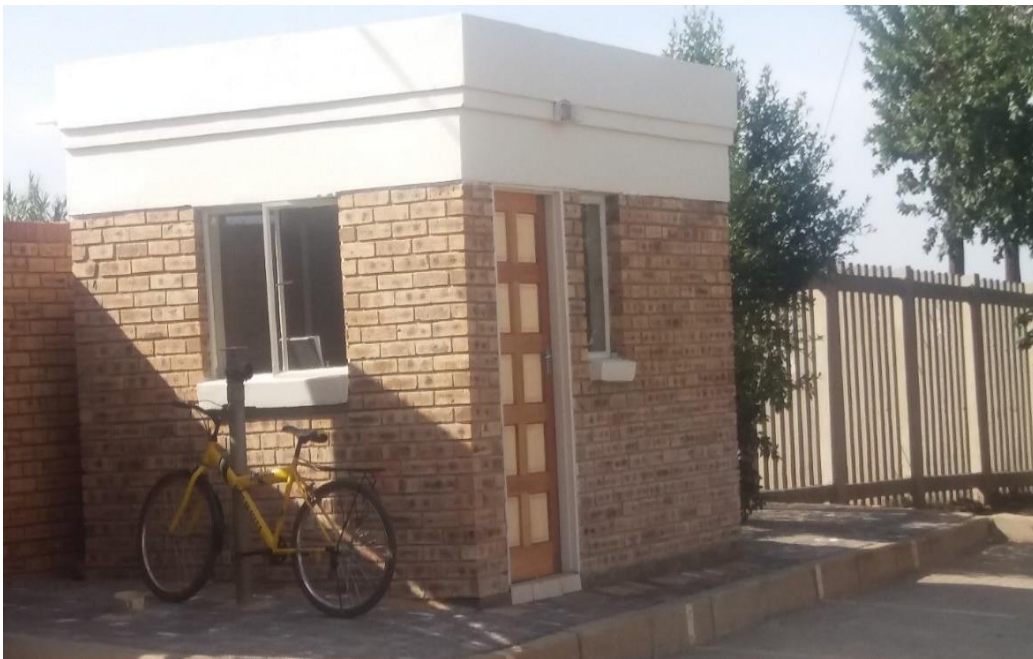


Figure 4.24: The guard house built for the security at the gate (Photo by TJ Tshabalala)

4.4.4.3.3 Day-to-day practices to achieve balance

Everyday practices

Curriculum delivery – Monitoring and support

Mr Sonny is aware of his roles and responsibilities, which propel him not to rest but keep focus, mainly focussing on activities that seek to optimise learner performance. While he has allocated some duties and roles mostly to his SMT, he was adamant that there were those that he could not delegate because of their importance, especially those involving staff discipline, and employment contracts. He spoke fondly about his managerial roles and instructional leadership:

You know, as a manager I discovered that the only way for learners to perform well, it is important that before the year starts, as SMT, we must draw up the school assessment plan, and we should also make sure that the SAT is functional.

This assessment plan is then discussed thoroughly with all the teachers in order to have their buy-in and then sent to parents. This is to also involve parents in assisting their children to prepare for the different dates of assessment. He also indicated the importance of curriculum management and monitoring (CMM). They have a curriculum monitoring plan, which details the dates on which the SMT checks on syllabi coverage for all grades. He continued:

If we find out that a teacher is behind with certain topics, then I talk to the deputy, the deputy will talk to HOD, and the HOD will decide to talk with the teacher concerned. The HOD must ensure that the teacher develops a plan that will help him make up for the lost time. And I will expect reports from both of them, so that I can rest assured that we are all pulling together.

Completion of the syllabus is crucial to learner attainment, and this was outlined by Sonny as he related that they have an annual teaching plan (ATP) which must be followed by all teachers without deviation, especially those in Grade 12. This plan ensures that they are able to complete their syllabi in time and have time to prepare learners adequately for examinations:

We have also ... you know, tried to popularise the issue of TAD & R, whereby we encourage teachers to teach(T), assess(A), diagnose(D), and provide remedial(R) teaching to those with learning barriers or underperforming. The diagnosis emanates from analysis of results, which will indicate areas where learners did not do well.

He took the time to explain his expectations from teachers when they do analysis of learner performance:

After the teacher has assessed the learners, we expect the teacher to do diagnosis, which should be done according to question by question. This will help us to know exactly where the learners need help. Then the teacher must come up with intervention plan. This is where they will be organising extra classes. And the intention should be to address those particular topics.

The year plan is attached below, to highlight the intention to complete syllabi by end of June in Grade 12, in order to allow learners ample time for revision.

2017 MATRIC IMPROVEMENT PLAN			
NO	Activity	Date	Responsible Official
1.	Morning studies	16/01/17	Deputy principal
2.	Syllabus completion	June 2017	Principal
3.	Study groups	30/01/17	Class educator
4.	Set all tasks and CASS activities according to CAPS requirements	January to November	Subject educator
5.	Constant motivation to be intense	January to November	SMT, experts, professionals, etc.
6.	Afternoon studies	30/01/17	Deputy principal
7.	Grade 12 signing commitment	26/01/17	Deputy principal
8.	Parents meeting	Once per quarter	Principal
10.	Avail all necessary resources for learners	30/01/17	Principal
11.	Early intervention on problematic and under achievers	January to November	Subject educator, HOD's and principal
12.	Visible place cards encouraging learners towards 100%	30/01/17	Deputy principal
13.	Easter, winter and spring classes	Easter, June and Spring vacations	Principal, deputy principal, teachers and enrichment programs committee
14.	Maintain standard of discipline- late coming, absenteeism and truancy	Daily- January to November	SMT & teachers
15.	Boost confidence, design special uniform for learners	06/02/17	Uniform committee, SMT & SGB
16.	Pregnancy problem: solicit parents intervention	January to November	Principal & L.O H.O.D
17.	Grade 12 block supervision	January to November	HOD's, deputy principal & educators
18.	Educator motivation	January to November	Principal and SMT
19.	Camping	Spring holidays	Deputy principal

Figure 4.25: An example of a Matric improvement plan (Primary data)

Stakeholder engagement

As indicated before, Mr Sonny has a very good relationship with his SGB. He ensures that they attend training organised by the district and Mathew Goniwe School of Leadership, where they are trained on their roles and responsibilities, as he explained:

I usually ensure that our SGB members attend the workshops that are organised by our district, as well as head office, such as financial management ... eer, and training on human resources management. I also involve the SGB in various school activities such as fundraising, and shortlisting and interviews of teachers when we have vacant posts.

With the SGB being willing to assist, Mr Sonny lamented the lack of skills. He understands the intention of the government with SGBs; however, the intention, according to him, did not seem to be working for township schools, where literacy levels alone are very low. He cited some of the suburban schools where their SGB members were mostly professionals such as accountants, architects, lawyers, etc. His

outcry emanates from the challenges he experiences whenever they have to do some maintenance in the school. This is how he put it:

The SGB is very supportive but I think the idea of the government or the department of saying the SGB should be established in schools, they thought of parents who are enlightened, who, who are professionals, who are businesspeople. They thought such parents would be elected to committees and they would help with their skills.

The skills level of his SGB members is very low and most of them are unemployed. These SGB members are keen to help but he does not find them very helpful when it comes to critical areas of the school's development. However, he appreciated their assistance in various areas where he had deployed them to lead, like monitoring the evening study programme during the week and over weekends.

Grade 12 evening classes from 26/10/2016 to 30/10/2016

	18h00 to 19h00	19h00 to 21h00	21h00 to 22h00	22h00 to 23h00
Mon 26 th	Tea	Accounting study	Supper	Study
Tue 27 th	Tea	Geography and economics study	Supper	Math/ math lit
Wed 28 th	Tea	Math/ math lit	Supper	Geography revision
Thurs 29 th	Tea	Math/math lit	Supper	Math lit revision
Fri 30 th	Tea	C.A.T	Supper	Math/ math lit

WEEKEND

DAY/DATE	08H00 TO 09H00	09H00 TO 12H00	12H00 TO 15H00	15H00 TO 18H00	18H00 TO 20H00	20H00 TO 23H00
SATURDAY 31/10/2016	BREAKFAST	MATHS/ MATHS LIT	LUNCH	MATHS/ MATHS LIT	SUPPER	MATH/ MATHS LIT.
SUNDAY 01/11/2016	BREAKFAST	MATHS/ MATHS LIT.	LUNCH	STUDY	SUPPER	STUDY

WEEKEND

WEEKEND

WEEKEND

Figure 4.26: Extra classes programme

The picture above presents the extra class timetable, indicating both the subjects and the duration of the periods. The SGB members are allocated days on which they supervise the programme.

Sonny strives to recruit very competent teachers in various school subjects. He pointed to the critical importance of good teachers, he said:

I also ensure that we select the best for our school. Whenever we appoint a teacher or we appoint an HOD or deputy, we are always striving to make sure

that we choose the best because if we get it wrong there, I think that person will not make a positive impact ... you know positive impact and improvement in the school.

All activities of the school are driven by the school's vision and mission statement which according to the principal encourage unity amongst all stakeholders. They developed a school development plan which he said incorporates all developmental activities they have planned over the long term. He went on to add:

I ensure that the SGB working together with the staff, we select a date on which we draw up the school development plan, because a school development plan (SDP) is the master plan based on the nine focus areas. Everyone is given an opportunity to say what is it we want to achieve.

The issues considered in the SDP range from academic to infrastructure and staff development. He is passionate about Grade 12 learner performance, which he said gives a school a unique identity. He focuses most of his attention on teaching and learning, and he is very strict with learner attendance which he monitors on a daily basis.

Meeting difficulties day-by-day

Mr Sonny's school is located in the old section of the township where the age group of the community is mostly above 50. This is where you find parents whose children have migrated to newly established townships, depending on where they got houses. Now they stay with grand children who are still very young, even to attend a primary school. This affects the school's enrolment. The principal was worried that the school was not growing; it was dying. He cited a number of initiatives aimed at recruiting learners to their school, but these do not seem to yield better results.

Another factor is that his school is not far from the other two high schools within the same community. Sonny indicated that his school's matric results have always been better than those of neighbouring schools, and he had hoped that parents would recognise that, and enrol their children in his school. This does not help, as this narrative shows:

The other challenge is that the school is located in the old community ... as a result our learner numbers are not rising at a very high speed and for the last year and this year, I see learner numbers dropping despite the good results we are producing in Grade 12.

He mentioned several challenges they grapple with at their school. Like the previous participants, the main challenge is burglaries and vandalism. He complained about the immediate community, which does not look after the school when they are not there. His complaint seems valid because he has gone out of his way to open the school for use by the community structures like church groups, who hold their Sunday services and conferences and camps at the school.

However when it comes to safety, he has to struggle alone:

We have maintenance committee which I made sure it was established and we were able to contact head office (referring to the education department), which was able to electrify and repair electricity and other electric equipment in our school. And we made sure that our showers are functioning, but the biggest challenge is theft and burglary.

Impediments to effective instructional leadership

The other major setback for Sonny is poor parental involvement. He narrated several examples where he had tried to invite parents to the school regarding barriers their children were experiencing in their different subjects, but parents would not attend. Even on those days where they have to collect their children's report cards they do not come. Sonny said:

I said, as a school we are issuing reports to parents, report cards ... and parents are not coming to the party, in order to know about the performance of their children, and again when the SGB calls parents meetings, attendance is not good ...

He expressed serious concerns about parents who do not support their children when it comes to matters of learning, and found it very sad that such parents do not even care about the progress of their children at school. He also expressed serious reservation about parents who do not care if their children were attending the extra

classes, which he believed were meant to benefit them. His efforts are indeed remarkable as he patiently explained to me.

We ensure that all learners attend Saturday classes as well as during the school holidays. Learners who don't attend, I take it upon my shoulders as the principal to phone their parents, to account to me why their children are not at school. If I don't find any joy from the parents' explanation, I personally visit the family of the absent learner. I don't find them; I send SMSs and expect a response.

The common problems like learners involved in drugs, discipline and teenage pregnancy were also mentioned, but Sonny was confident in the work done by the SBST coordinator who he believes is doing a good job, considering that the statistics on these challenges were dropping gradually. They also have partnerships with the Department of Social Development who assist with the supply of school uniforms to learners, as well as working relationships with some NGOs operating in the community. Mr Sonny:

The other challenge is you know ... poverty, where our school is situated, and some parents are not working, and they find it difficult to buy school uniform for their kids. We are having the SBST coordinator who has organised an NGO which supplies school uniform to our needy learners.

The other challenge expressed by Sonny is lack of participation in extra curricula activities by teachers. His teachers complain about having a lot of work, and not having time for extra-mural activities, which would also need them to arrange practice sessions after school. He expressed his dissatisfaction about the level of involvement of his teachers:

I'm having few teachers who are involved in extra mural activities, for instance in soccer we have a General Assistant who is acting as a coach. In netball at least we have a teacher who is involved, but we find that with other sporting codes, teachers are not involved. We tried to interview them and try to find out why they were not involved, they talked about curriculum challenges, they are under pressure, and need to make sure they complete the syllabus.

Secret weapon – success factor

Mr Sonny mentioned a number of strategies which account to their success, most of them are things he introduced when he arrived in this school which was underperforming before; from discipline to effective culture of teaching and learning, to collegial relations amongst staff members. One of the significant ways he uses to forge healthy and sound human relations among his staff is celebrating important days like the Fathers' and Mothers' days. These they celebrate as staff, over some refreshments. It is on such occasions that he expresses his appreciation for his staff and what they do for the school, as a way of keeping them motivated, focused and united.

Blase and Blase's (2000) study points to another important aspect which illuminated the effect of praise on teachers. They discovered that praise evidently improved teachers' motivation, self-esteem, efficacy, and encouraged "teacher reflective behaviour, including reinforcement of effective teaching strategies, risk taking, and innovation/creativity" (Blasé & Blasé, 2000:134).

Meeting set targets

He also celebrated all achievements like good results with both educators and learners. He promised all learners and educators who performed very well at the end of each term a free lunch. He told me that he usually sent them to KFC to have lunch. The learners and educators alike appreciate this gesture. Therefore this encourages a healthy competition among both educators and learners to achieve the set targets, in order to qualify for free lunch. As he explained:

I'm trying to encourage them and tell them at the parade that I will speak to the SGB, and if they got 100% pass, I am going to organise a free lunch to those particular learners. So in term one I organised free lunch, and bought the Grade 12's... eer ... KFC lunch boxes.



Figure 4.27: Some of the learners who received certificates for academic performance (Term 2)

Such gestures have made him popular with the learners, and everyone always looks forward to being part of the top achievers who will go out for lunch with their teachers. These incentives are meant to encourage results of good quality, and as he said, he would like all his learners to obtain university entries with lots of distinctions. Coming from poor backgrounds, he believes these distinction will then enable his learners to obtain bursaries to further their studies at tertiary institutions.

One other thing that Mr Sonny highlighted was that every academic year he, together with his staff and learners developed a motto that served as the driving force behind all activities of the year, especially those relating to curriculum. He proudly explained each of the mottos they generated for the past three years like this:

So our motto for this year is “All or Nothing”, and last year it was “Siyabangena”, and the other year it was “Higher and higher”. And I think four years back it was

“Wavutha Umlilo”. So these mottos, we always coin them each and every year to promote good performance, which is one of our key characteristics.

Every term they take photos of best achievers and place them on the main notice board in the foyer of the administration building. This, according to Sonny, also instils a certain sense of pride among the Grade 12 learners in particular to want to do more, and have their photos on the main notice board. This is additional to the top ten awards they give to best performers at the school assembly every term.



Figure 4.28: Top achievers on the notice board (Photo by TJ Tshabalala)

The picture above shows top-achieving learners. Most importantly, take note of the motto “higher and higher nothing can stop us”, which inspires the top performance.

The notion of charting a clear direction for a school through vision and mission and goals as demonstrated by Sonny has also been endorsed by a brought body of literature (Johnson & Asera, 1999; Nettles & Herrington, 2007; Hallinger, 2003). These scholars agree that actions of the principals are very important especially personal involvement through school assemblies, newsletters and other communication methods with learners and parents. This will assist learners and parents to know and help realise the school vision and mission.

With regard to instructional leadership, Mr Sonny mentioned a number of strategies which, according to him, account for their excellence. Their strategy includes working extra hours in the form of afternoon study and night study, supported by extra classes

on Saturdays where student teachers from the local university are utilised to teach the Grade 12 learners, as relief teachers where his teachers are unable to attend. These students are then given a little stipend every month to compensate them for their efforts. However Mr Sonny was upbeat about the work done by the student teachers, and explained this way:

So it becomes a problem because it is not every time that your teachers will avail themselves on Saturdays, so I'm forced to outsource teachers from the other schools or students from the NW university to come and help, especially where teacher X won't make it on a particular Saturday.

Sonny admitted that in all these extra classes and study periods, he has to be around to monitor and offer support. This is in line with what he believed in, which is to demonstrate exemplary leadership. According to him, he does this to encourage his staff to join in and assist, as he proudly explained:

You know, by excellence ... it means when I'm doing something, I'm pushed by that little inner voice that says I don't want to fail, and not just failing, I also want to produce the best. And that influence has also influenced my staff.

This little voice inside of Mr Sonny comes out in all discussions about results. He admitted that he is driven by his passion and belief in excellence, and this does not give him sleep at night. He always goes out of his way to achieve it. He related:

Just imagine a situation where the principal talks, motivates and encourages the staff to go an extra mile in the morning and in the afternoon, on Saturdays, but the principal is not there. I don't think they would take what he says seriously. But if you become exemplary, they see after school you are not the first to leave. Sometimes they see you when you leave school at 8hoo in the evening, and they realise that they can also do the same.

Sonny eloquently went on to explain other strategies that contribute to their success, like the accounting sessions that he conducts with his SMT, where all teachers, particularly those teaching Grade 12, give account of their curriculum delivery and how they hope to improve their performance. He said these accounting sessions assist him to prepare for his report to the circuit manager when he goes to account. All schools

in their district have to account to the circuit manager and the district director, for the Grade 12 performance every term. He went further to say:

You see I have to knock off late at times because you may find that there are other things I should have done during the contact time, but I could not do. Therefore I need to use part of the time I have after school. For instance at times I have to prepare for the circuit presentation sessions whereby they want to know about learner performance in Grade 9 to 12, and compare the various term performances, and also look at learners who are at risk.

SUBJECT LEVELS. GRADE 12												
SUBJECT	EDUCATOR	No. OF LEARNERS	No. PASSED	% PASSED	LEVELS							TARGET
					1	2	3	4	5	6	7	
PHY SCIE	Mr MOTSOANE MRS. DLAVANA	62	60	97	2	15	17	6	14	4	4	90%
LIFE SCI	Ms MOTAUNG MR. RANAKE MR. MNQOSILE	140	140	100		3	16	44	43	21	13	100%
GEO	Mr SEANEGO MR. MODUPE	96	73	76	23	36	30	6	1			100%
HIST	Mr THOKOANE	47	47	100		6	23	15	3			100%
TOUR	Mr MOLETE MR. MAINE	79	76	96	3	6	17	27	17	8	1	100%
CON STU	Ms HILIZA	32	32	100			3	2	6	12	9	100%
MUSIC	Ms LEKABE	5	5	100				2	1	2		100%
LIFE ORIE	Mr OUBANE	236	236	100			104	80	37	9		100%

Figure 4.29: Extract from analysis of term results (Primary data)

He conceded that school contact time is not enough to do all things that made their school what it is today. He mentioned a whole lot of things that they did, some of which he was reluctant to discuss probably for fear of selling out some of their secrets for success. However, he was very open and generous with sharing their tools for success.

Achieving balance

Sonny highlighted a number of actions and activities that he is involved in daily, and all of them are geared towards ensuring that all areas of his scope of work are covered. He also indicated that it was not easy for him to achieve balance, but since he started delegating and sharing responsibilities with his SMT, SGB, and structures in the school, he was able to focus on instructional leadership, specifically in Grade 12.

However, he mentioned the fact that school times do not allow him to reach all his goals; hence, he worked extra hours and weekends.

4.5 DISCUSSION

In this chapter, I outlined the steps I took to unpack the massive data collected through various methods. This data were rigorously tested for validity through the triangulation process, which verified the data from the interviews against the documents and observations. This illuminated all the main activities that participants are involved in on daily basis, as they go about their dual mandate of balancing management and instructional leadership in their schools.

It has been shown that while participants achieve success in their different schools, this success cannot be attributed to a single strategy, method, or action, and that schools mostly operate independently of one another. The participants were all dedicated to their work and profession, and one could see the passion with which they were eager to talk about their work especially on success. It was clear that with limited resources, aggravated by the fact that all these participants come from the “No Fee” quintile one schools, indicative of poverty levels, these principals are doing the best they can, and throwing in whatever they have to achieve their success.

It is evident from preceding arguments that most of the school principals are still battling to understand their roles as instructional leaders, and it becomes more complex when they have to implement and enact the part. Olivia (2009) asserts that even the training programmes for principals on curriculum issues are partly to blame as they do not emphasise and promote instructional leadership by principals. My interactions with these participants suggests a lack of understanding of the term, Instructional leadership, yet their actions point to its somewhat successful implementation. The term ‘curriculum delivery’ is more popular than ‘instructional leadership’. This is mainly so because it is populated directly by the various districts’ officials.

The narratives presented in this chapter illuminate a number of interesting facts about the four participants and their schools. The themes derived from these stories and cases highlight how principals go about their dual mandate as instructional leaders

and school managers in South Africa. Principal Mosiuwa, who believes in reading and understanding departmental policies before sharing them with his staff, alluded to the value of policies in his school and mainly elaborated on the pass requirements for learners. He believes this policy enables him to set high standards in his school, but is not content with these requirements in the FET phase, where according to him, the Department of Education has dropped standards by reducing the minimum pass.

The second policy he relies on is about the human resources affecting job description. This policy allows him to distribute work among his educators accordingly, and can also delegate some of his tasks to his SMT according to their different post levels. He is also guided by policy on leave to ensure fair management of teacher absenteeism. Mosiuwa, however, has some concerns regarding this policy, because some of his staff members have developed a tendency to bypass some of its imperatives. This is something he can manage but as he has said, requires and consumes a lot of his time.

Mrs Mathapelo, on the other hand, cited the policy on appointment of educators, the *Employment of Educators Act* (Act 76/1998), which she alluded to being helpful in terms of allocation and provisioning of teaching posts to her school. She, however, feels robbed by the Department of Education when they deploy teachers who are qualified to teach in primary schools to her secondary school. Her gripe arises from the fact that these teachers can only teach up to the senior phase, and she cannot allocate FET (Grade 10–12) classes to them. This impacts on her ability to be flexible in deploying expertise in his school to any grade at any given time, especially when some of her staff members get promoted to other schools and institutions or leave the school.

Another policy she mentioned is about the working hours of his teachers. In her efforts to achieve excellence and having realised the need to work extended hours in order to achieve a balance in her work, Mathapelo requested her teaching staff to work an extra hour per day. This did not go off well with some of her teachers. They indicated that they were only employed to be at work for seven hours per day and that they were not prepared to go beyond that. The matter became so serious that they even reported the matter to their union, which took their side. However, she persevered and went on together with the willing horses.

The whole issue was based on the misunderstanding of the policy by her teachers who thought the minimum hours enshrined in the policy was in fact the maximum. She mentioned that the extra time allows her to finish some of her work and meet departmental deadlines, because as she said, she “*dislikes missing deadlines*”. These extra hours have also added value to learner achievement because she spends most of it on instructional leadership, ensuring learners were taught, supervising the study period, and assisting educators with whatever resources they may need during that time.

Mr Gomolemo, on the other hand, spoke fondly about his school’s success notwithstanding the challenges he faced before. He finds the school policies they developed at school very important as mandated by the *South African Schools Act* (Act 86/1996). As a former subject facilitator and a district official, he understands the implications of policy adherence and compliance by all schools. He singled out two policies which he believes benefit his school and allow him to achieve his goals. The admissions policy came first, especially that his school is the only one offering English Home language in their township, where most of the learners used to travel to suburbs in order to be taught in this language.

It was difficult in the beginning to attract these learners to enrol at his school. Since registrations for all Grade 1 and 8 learners were done online in Gauteng, he and his school became beneficiaries of this new policy. Learners are now allocated schools that are nearer to their residential areas, according to their home addresses. He was upbeat when he told me that his learner enrolment increased tremendously since the introduction of this admission policy, and has enabled him to set his ambitions even higher, by making conditions in his school conducive and compatible to those in suburban schools. He was also fortunate to have some of the teachers from the suburban schools deployed to his school, bringing a racial and cultural mix of teaching staff composition in a township school. Something very uncommon in many township schools in South Africa.

When coming to Mr Sonny it was a case of love at first sight. I found a school leader who loved his work so much that he would go all the way just telling you about his school without being led by interview questions. I had to interject him constantly in order to realign his elaborate sentiments to the interview questions. He however was

more than happy to indicate that producing good results was his nature, explaining that he always produced 100% pass in his subject as a history teacher. As a leader leading by example, he also offers history in two classes, Grades 11 and 12, and his results are a true testimony of the type of teacher he is. He also finds time to lead, manage and drive instructional leadership in his school. So much so that the past five years have been a roller coaster ride for him, producing very good results.

He attributed his success to adherence to departmental policies, mainly those relating to curriculum. He employs various strategies in his leadership that enables him to lead instruction from the front. These include extra classes, strict monitoring of learners attendance, especially punctuality which accounts to time on task for both learners and educators. He has deployed the SMT in various sections of the school to manage and control, ensuring constant feedback and then following up on matters of serious concern. Structures like the SGB are very helpful even though he lamented their lack of skills. However, he feels that their presence add value to his success, especially when he has to address parents. Other structures like the SBST also play an enabling role in dealing with socio-economic issues affecting learners in his school.

Sonny relies mainly on departmental policies and as indicated earlier, curriculum is close to his heart. He appreciates the Department of Education's efforts to allow all learners opportunities to progress from one grade to another; however, he feels bad that learners who do not meet pass requirements are allowed to progress to Grade 12 in particular. His point is that such learners quickly forget that they were progressed, and tend to behave as if all is well in terms of their mastery of the curriculum topics from the previous grade.

In addition, he feels for the educators who do their best during the year to encourage learners to study hard, only to find that some of the uncooperative learners get progressed anyway.

Another challenge is that these learners do not usually accept the advice to enrol for fewer subjects to do better in terms of the MEO agreement. Yet the Department of Education would usually blame school principals for failing to implement MEO agreements with such learners.

This chapter presented and discussed the narratives from the four participants on how they go about carrying out their dual mandate as managers and instructional leaders in their schools. All data collected through interviews, observations, and documents were rigorously analysed and presented. The next chapter will present cross-case analysis and interpret the findings generated from the data discussed in this chapter.

CHAPTER 5:

CROSS CASE ANALYSIS: THE COMMON AND THE DIVERSE

5.1 INTRODUCTION

In Chapter 4, I presented a detailed analysis of collected data, dissecting it into smaller, but meaningful chunks, which later gave rise to common themes that were drawn from the narratives of the four principals who participated in the study. The purpose of the study was to find out how school principals go about carrying out their dual mandate as instructional leaders and managers in South African schools. The following major themes constantly emerged during interviews: policies that guide the work of school principals; structures and resources; and the day-to-day practices of principals.

This chapter provides a cross-case analytical account of the data that were presented in Chapter 4, and present the key findings of the study. This is done through a comprehensive analysis of all the collected data, in order to establish the common and the diverse arguments across the four cases under discussion. I begin with a thematic cross-case analysis, also selectively roping in the narratives presented in Chapter 4 in order to respond more directly to the research questions proposed for this study. As discussed previously, there is ample evidence to demonstrate that the post of a principal in a school carries a lot of responsibility and accountability, and demands of school principals to always seek innovative ways of doing things, as emphasised in the next paragraph (5.2). The narratives that follow will unpack this claim in the context of the data collected from the four case studies.

Principals' backgrounds at a glance

Table 5.1: Participants' background

School	Principal	Gender	Age	Experience	Qualifications	School size
Mosiuwa H/S	Mosiuwa	Male	58	30	STD, BA, FDE	1526
Mathapelo H/S	Mathapelo	Female	44	17	B Com Ed	1014
Gomolemo H/S	Gomolemo	Male	49	19	STD, BA	1215
Sonny H/S	Sonny	Male	56	33	STD, BA	823

5.2 FINDINGS FROM THE LITERATURE REVIEW: A RECAP

Scholars agree that school principals wear many different hats in their daily operations, including being an administrator, an instructional leader, and many more. What is more critical in each principal's workday seems to be the balancing act of being able to move seamlessly between all these various roles. Hallinger (2010) asserts that a focus on the technical aspects of the principal's job should balance with instructional aspects, thereby enabling principals to engage more in their schools' instructional programmes.

On the other hand, principals have to report to the parents of learners about the progress of their children, as well as to the education department on a number of issues, which include curriculum delivery and learner achievement (Levine, 2005). However, according to Louis *et al.* (2010), the learning needs, development and support of the school principal, who is sometimes referred to as the instructional leader or the lead learner of the school, have garnered much less attention. More often, these school principals are left to fend for themselves without any training nor induction, or support.

There is a fundamental story that permeates through all the narratives of the four participants, which positions school principals in the centre stage and at the heart of the intersecting crossroads within a school setting. These crossroads are multi-sectoral and strongly linked to one another, and include the SMT, SGB, teaching staff, general and administration staff, parents, learners, and the broader school community.

It is also significant to indicate the memorable tales of the past that the school principals draw on as they navigate their way through the crossroads. All these came out during the analysis of data and emerged into narratives on leadership, management and instructional leadership specifically, which were frequently mentioned together with stories of school success and academic achievement. Although these three concepts appear to be powerful and vital determinants of school success, they constitute the core of the roles on which school leaders' success is generated and anchored, as demonstrated by all the participants in their quest to respond to the interview questions during our discussions.

5.2.1 The roles and responsibilities of school principals

According to Christie (2001:291), “a dominant belief in educational and government circles in South Africa is that principals can and should make a difference in the academic standards of schools”. This therefore calls upon principals to lead instruction and provide dynamic leadership focussed on raising the standard of teaching and learning in their schools. It is, however, commonly observed that school principals often wear many hats, acting as managers, administrators, curriculum leaders, and instructional leaders at different times of their workday. They juggle around all these different roles in a quest to attain a balancing act. However quite often, many scholars have found that more time is allocated to managerial and administrative activities as previously posited by several researchers that, while it has been globally established that instructional leadership is key for schools to be effective, it is seldom practised.

5.2.1.1 Instructional leadership

The participants’ inclination to focus on Grade 12 learners also did not come as a shock, because a shift in emphasis on secondary school leadership has been centred on national matriculation results in recent years. Principals are now held accountable for learner performance, and matriculation results have for a long time been the only benchmark used by education departments to differentiate between so-called effective and dysfunctional schools (Levine, 2005).

This has placed a lot of pressure on school principals to ensure that they produce good matriculation results. This finding confirms the results of scholars like Fullan (1991) and Flath (1989), who observe that out of all tasks performed by school principals, only one tenth was on instructional leadership. The reasons advanced for this were vast, but include lack of training, too much paperwork, and the communities’ perceptions around the role of the school principal as more of a manager and/or administrator (Fullan, 1991; Flath, 1989).

On the other hand, the narratives are also in sync with findings by Grigsby, Schumaker, Deckman and Simion (2010) that the principals’ level of change towards instructional leadership had not been fully achieved, in spite of having remarkably increased accountability on their shoulders. Hence, Kruger (2003:291) adds, “principals should

therefore become leaders of instruction and with dynamic and inspirational leadership focus on raising the teaching and learning practices in their schools”.

5.2.1.2 Distributed leadership

Omar *et al.* (2011) go further and have found that a better balance was mostly achieved in elementary schools, compared to secondary schools. The participants in this study, however, explained their instructional leadership in the lower grades as well, which mainly occur on supervisory level, where they apply distributed leadership. All participants spoke about their reliance on the SMT members, especially deputy principals, to whom they have distributed some of their duties and roles. This was explained by their responses to how they utilised resources, structures and systems they have at their schools.

5.3 CROSS-CASE NARRATIVE ANALYSIS AND INTERPRETATION

I used a cross-case narrative analysis as propagated by Creswell (2013) to answer the three sub-research questions. In addition to that, I also interrogated common themes that emerged from the narratives in Chapter 4, and their relation to the conceptual framework as well as the literature reviewed in Chapter 2. This enabled me to establish whether the functioning of the school principals were in line or in contrast to recent empirical data and research, as discussed above, and also to strengthen the findings of the study.

Table 5.2: Summary of Themes

No	RESEARCH QUESTIONS	THEMES	SUB-THEMES	CATEGORIES
1	What are the policies that guide the work of school principals in South African schools and how do principals make sense of these policies?	Policies that guide the work of principals	Making sense of policies	School Policies Departmental policies
2	What structures and resources do principals rely on to carry out these policy guidelines in their dual mandate of management and instructional leadership in schools?	Structures and resources	Existing structures	Management structures Instructional structures
			Available resources	Management resources Instructional resources
3	How do principals go about their day-to-day practice of leadership and management of schools and how is the balance achieved, if at all.	Day-to- day practices	Day-to-day activities	Instructional leadership Managerial practices
			Achieving balance	Distributed leadership Proper planning Extra mile Leadership style

5.3.2 Policies that guide the work of school principals

In Chapter 4, I discussed some of the legislative framework that has an impact on the work of school principals, and it emerged that while education departments often have very good policies, they are left to school principals to implement, and this sometimes presents serious challenges in schools. The implementation of these policies depends first on their understanding and interpretation by principals and secondly on the capacity (and/or resources) to implement at each school.

Making sense of the policies – Knowledge and understanding

School policies

All four participants referred to the importance of both departmental and school policies at their schools. As a former district official, Gomolemo, spoke fondly of the benefits of departmental policies, which he understood quite well due to the training he received in his previous job. It was his job to monitor compliance by schools. A proud Gomolemo expressed himself as follows on the policy knowledge and understanding:

I must say that being at the district helped a lot. We used to attend a lot of capacity building trainings, especially on policies. Although our focus there was on curriculum, I also learned how to interpret policy.

The situation was slightly different for Sonny, Mathapelo, and Gomolemo, who also outlined the value of school policies, which they ensured were duly implemented, mainly from their own innovative understanding as opposed to receiving any formal or professional development and training(see par. 4.4.3.3.1). Common among the school policies were the learners' code of conduct. All participants explained that this policy enabled them to establish discipline among learners, as explained by Sonny:

I encouraged the SGB and the staff members to draw up a code of conduct for learners. After drafting it we made sure we circulate copies to the learners who in turn had to give them to their parents. The parents were expected to sign the code of conduct and bring back another copy to the school for filing. This gave parents a clear understanding of what type of behaviour is expected from their children, and what will be the repercussions if they do not toe the line.

School policies are the responsibility of the SGB, which must ensure that they are drawn up and implemented in order to address some of the critical issues faced by schools from time to time. Mathapelo and Gomolemo only indicated that the learners' code of conduct assisted them to maintain discipline at their schools, especially when considering the situation that prevailed at their schools when they took over the reins where the learners were ill-disciplined. Mosiuwa (and Sonny) did not talk much about school policies, except to indicate that he ensured they were drawn up and reviewed annually so that they remain relevant (see par. 4.4.1.3.1).

Departmental policies

Mosiuwa was, however, quick to highlight his approach to departmental policies and how they benefited him in his daily work. He preferred to read policies thoroughly and derive meaning and understanding before he mediated them to the rest of his staff. Mosiuwa, however, lamented the lack of training for school principals, which would ensure common understanding and effective implementation. He felt neglected and left to struggle on his own, even as he went further to highlight some of the policies which assisted and enabled him to lead and manage his school. The same sentiments were expressed by Mathapelo and Sonny who, while they appreciated the efforts of the education departments, felt that the training they had received was not enough. Gomolemo, on the other hand, agreed with the other participants, but expressed his

situation differently, given the advantage he had over them because of the training he received while he was still working at the district office.

Implementation of policies to improve management and instruction

Mosiuwa relied more on the Norms and standards in education, and in particular the *Employment of Educators Act* (EEA, 76/1998), which talks to the job description for educators. He indicated that this policy allowed him to allocate duties equitably to his teaching staff. His sentiments were shared by Gomolemo, Mathapelo and Sonny, who explained how they distributed the workload among different stakeholders at their schools. With Mathapelo, this policy was more enabling, even as it posed a challenge in terms of educator appointments and deployment. She was able to allocate duties to her educating staff but only to realise that sometimes some of the teachers had primary school qualifications, while employed at a secondary school.

This becomes a problem when she has to allocate duties, because such teachers are not adequately prepared to teach senior classes like Grades 10, 11 and 12. She also explained that even though she would like to teach a class or two herself, she could not, because her teaching subjects were over-subscribed in terms of staffing. Taking some of the classes herself would render some of the teachers in her staff redundant:

At school here, my major subjects are commercial subjects. I teach Accounting, Economics, and EMS, but now, because that department is over staffed, I was not going to be able to have periods to teach.

Gomolemo was all smiles when talking about one policy in particular, the online learner admission policy. He confessed that the policy enabled his school to grow, because parents could register their Grade 8 learners online, and the education department (through the district offices) would then allocate and place those learners in the nearest schools to their residential homes. Gomolemo benefited immensely from this policy since his school is the only one offering English home language in the area. Most township learners who had attended the English medium primary schools in the suburbs were now directed to his school, thus increasing his learner enrolment. Offering English home language in a township school changed from being a curse to a blessing to his school. He said with a chuckle,

Our learner enrolment was about 400 when I came here, but now ... we are well over 800 learners..

Another policy that Gomolemo relies on is learner attendance policy, which he said allowed him to strictly monitor attendance of his learners. Attendance registers are marked daily and sent to him for control. He believed absenteeism affects achievement negatively, and monitoring attendance had been one of his strengths in achieving success. The other three participants did not indicate any concerns with attendance; however, Sonny spoke a little about attendance during extra classes and the study period. Mosiuwa, on the other hand, cited the importance of the staff leave policy with some reservations. He was happy that the policy allowed him to manage leave fairly, but he pointed to common challenges, where some teachers in his staff played games with him, taking advantage of the same departmental official leave policy. His understanding of this policy may, in fact, be the problem, as the policy is clear that if there appears to be a pattern, then the principal is entitled to demand a medical certificate in case of sick leave. Other participants did not have issues with leave policy for staff members.

Mosiuwa and Sonny also spoke about the guidelines on learners' pass requirements (see par. 4.4.1.3.1), and how they regulate progression of learners from one grade to another: Mosiuwa complained that the guidelines were not consistent. His gripe is that these requirements are more relaxed in the senior grades, especially in Grade 12 compared to the pass requirements in the lower grades. As a strict disciplinarian, he argued that the strict conditions for a pass should be maintained across all grade levels. On the other hand, Sonny agreed with Mosiuwa, but took it further to highlight the issue of learners who fail a grade several times and are then allowed to progress to the next grade even if they did not pass.

Another policy mentioned by Mathapelo is on the working hours of teachers (see par. 4.4.2.1.1). She used the policy to add value to her work by extending the school day in her school, especially for the Grade 12 learners. She was convinced that the strategy would improve learner performance and allow her to also attend to some of her managerial duties. Although some of her teaching staff were initially opposed to it, she none the less continued with a few willing horses, and as soon as the results

improved, she no longer had to ask teachers, they came forward and volunteered to stay until late, and she has never looked back since.

5.3.3 Structures and resources

5.3.3.1 Existing structures

School management comprises various interrelated tasks. All these tasks are tied within the broader aims of the school and should directly link up with the instructional leadership of the principal.

Global changes are taking place in education and they result in the decentralisation of decision making powers to school management level. This further reinforces the role of the principal as a key figure in the provision of effective teaching and learning. (Blasé & Blasé, 1999:353; Bossert *et al.*, 1982:40)

5.3.3.2 Functionality of structures and the role of individual members

All four participants narrated how they made use of structures, systems and resources at their disposal in their schools. The structures are mostly common in all the schools, as they are mandated through departmental policies. What I found interesting is that all principals (participants) had two deputy principals, except Gomolemo who had only one. However, the pattern of distributed leadership appeared to be similar in the four schools. In Gomolemo's case, the gap of the second deputy is made up by deploying one of the HODs to that role (4.4.3).

Participants indicated that they delegated duties to the deputy principals and HODs according to the different sections and blocks, and/or grades in the school, (par. 4.4.3.3.2). For example, this is how Gomolemo explained it:

We have 4 HODs, so in the past we were working with only 2. So I was responsible for one of the blocks and the deputy was in charge of another. So luckily, now the HODs are 4 and the blocks are 4 and we are also fortunate to have infrastructure the way it is, because now learners are contained within.

This idea of school leaders working together is emphasised by Joachim (2010), where he supports working together towards a common goal and vision.

Mosiuwa, Mathapelo and Sonny also indicated that they delegated certain roles to SMT members where the two deputy principals were in charge of the two phases in their schools, the GET (Grades 8–9) and FET (Grades 10–12) phase. This is followed by HODs who are then responsible for the different blocks depending on the school's architecture. The focus on involvement and stakeholder participation resonates with Bush and Coleman (2000)'s assertion that their inputs ensures their commitment to the school's vision. This approach enables the principals to get information from all classrooms easily and much quicker, and monitoring also becomes effective, as Mathapelo alluded:

We have 5 HODs and all of them are grade heads, like for an example, I'm having one HOD for Grade 8, the other one is for Grade 9. But because in Grade 10 I've got more classes, I have 7 classes, there I have 2 HODs. Then the other one is responsible for Grade 11, and as far as Grade 12 is concerned, I am personally managing it.

Her preference for Grade 12 was also shared and emphasised by Mosiuwa. Although they delegated the supervision of other grades to various members of staff, they kept Grade 12 supervision to themselves. Mosiuwa, Gomolemo and Sonny also alluded to this point, citing the very critical importance of the matriculation results as their driving force. Although Sonny differed slightly with the other three participants with regard to his involvement with Grade 12s, he still took ownership, as he aptly put it:

One deputy is the chief invigilator for internal exams (Grades 8–11), and the other one is the chief invigilator for Grade 12, but even though I'm delegating the responsibility to them to run exams, I do not give away my accountability. I'm still accountable for anything wrong that could happen in those particular examinations.

5.3.3.3 Available resources

All participants were fully aware of the importance of resources in order for teaching and learning to prosper, and two of them actually highlighted the effectiveness of the LTSM committee in their schools. To ensure proper and adequate procurement of

these resources, Sonny appointed one of his deputy principals to head the LTSM committee, which is responsible for all procurement.

So I have put the deputy to be responsible there. I utilise this deputy for LTSM, textbooks for learners and other resources are playing a very important role, in ensuring that curriculum is delivered. It would be very difficult to achieve our curriculum aspirations if learners don't have resources. So the deputy is there to co-ordinate that particular section.

Mathapelo, on the other hand, complained that learners at her school did not appreciate the value of textbooks. She was constantly battling to retrieve textbooks and other learning material loaned to the learners. She explained:

The issue of learners losing textbooks and so forth, our parents cannot afford to buy textbooks, and they are not instilling that to the learners, that they should not lose their textbooks, otherwise they will have to pay.

She emphasised that this affected the learners who had to use those books the following year. These sentiments of the four participants are in line with what many scholars have argued, namely that instructional programme of a school needs to be supported by availability of physical and human resources in order to achieve the instructional objectives (Chisholm & Vally, 1996).

5.3.4 Day-to-day practice

5.3.4.1 Day-to-day activities – Knowledge and skills to lead instruction

All participants in this study demonstrated an understanding of their multifaceted roles in the schools and the ability to make the most of their different situations as Mosiuwa stated:

I'm just interested in the curriculum. I believe our core business here is teaching and learning, so as a manager I should be conversant with instructional management and leadership.

Mathapelo also believes:

it's all about making sure the school runs as effectively as possible, that everyone is doing what they are supposed to be doing at work. Teachers must teach and learners must learn, that's it.

Gomolemo agreed with Mosiuwa and Mathapelo and added,

It is my responsibility to plan and carry out all the plans we have in place.

Sonny confidently outlined his role in the school as a leader, mentor, and manager. This is how he put it:

I'm someone who is striving for excellence, particularly with regards to curriculum delivery and learner performance. I want to see learners unfolding..., you know, and unlocking their talents in different subjects, where they have the potential to do so. And I believe a school is a powerful institution that can transform our society.

Gomolemo, Sonny, Mosiuwa, and Mathapelo all agreed that curriculum delivery takes centre stage in all their activities, as highlighted by the work of authors such as Hora, Oleson and Ferreira (2013). They are aware that they carry the responsibility for learner performance. Listening to them explaining their roles, one could feel the passion they exude as they related their activities and the success they achieved over the years. A display of some of their trophies and certificates on the walls and in cabinets, as evidence of their achievements, added credence to their stories. The participants' sentiments resonate favourably with recent research by various scholars who suggest that principals need to take the role of instructional leadership very seriously, and for that to happen they need to effectively free themselves of bureaucratic administrative tasks, and channel all their energy into teaching and learning and proactively lead and supervise instruction (Jenkins, 2009).

Still on the roles, Mathapelo added that, as an accounting officer she has to also see to the needs of other staff such as the general assistants and administration assistants. This is how she stated it,

I have to make sure that everyone is doing what they are supposed to do, and provide support.

While Mosiuwa believes he is managing the school on behalf of the provincial head of the Department (HOD), he was quick to mention that he has delegated some of his duties to his deputies, except Grade 12, which he said belongs to him:

I'm very much into Grade 12, everything about instruction there. What are the teachers teaching? How are learners performing? What are the results saying? Why are we getting this percentage? We study data; every time there is an examination they must submit data to me and I look at the figures.

Mosiuwa's sentiments were also echoed by Mathapelo and Gomolemo who also emphasised their involvement in Grade 12 matters. However, Sonny took it further by adding that he also teaches History in Grade 12, and has recently taken over a Grade 11 class as well. He went further to explain that teaching the learners helps him to understand some of the challenges confronting teachers in their classrooms. This is what he said:

I must say, in teaching these learners helps me a lot, to know them and as I interact with them and they also happen to know and understand me a little bit, what type of a person I am and again as the principal, when my performance is good, for instance in Grade 12, I'm used to producing 100% pass year in and year out, that also serves as a motivation to the teachers.

5.3.4.2 Managerial skills and leadership competence

Over and above the role of instructional leadership, participants also mentioned other duties and activities they perform in their daily work life. These include managing learner discipline, late coming of both learners and educators, absenteeism, assessment and other socio-economic challenges, school infrastructure, and financial management. Their reflections were all common and in line with most institutions of a similar nature. One other observation is that all the participants appear to be “disciplinarians” who are demanding and work very hard to ensure that there is order at their schools.

It is not surprising that all the four of them explained their roles in terms of “curriculum delivery”, as they put it. In the South African context, education departments have not espoused the term “instructional leadership”, and this has been repeatedly exposed by the participants in this study where they call themselves “school managers” whose

core business is “curriculum delivery”. From the narratives derived from our interviews, and my observation during visits to their schools, these participants are in fact “instructional leaders”, and immerse themselves in activities of instructional leadership even as they do not speak of their work in those terms. The vocabulary they use is different and consistent with the dominant discourses on curriculum delivery in this country.

5.3.4.3 Planning

The four participants agreed that proper and comprehensive planning was at the core of their functionality. They individually explained the different types of planning they engage in, which includes among others, strategic planning, school development planning, school improvement plan, academic performance plan, and the year plan. Mosiuwa explained his planning as follows:

You need to have a school development plan that is separate from the academic performance improvement plan (APIP). Where do you want to see yourself in three to five years' time as a school, based on the nine focus areas of whole school evaluation.

When explaining his role, Sonny also emphasised planning and how it enabled him to also find time to teach in his hectic schedule:

As a manager I discovered that in order for learners to perform well, it is important that before the year starts, as the SMT we must draw up the School Assessment plan, and we should also make sure that the SAT is functional in order to execute the plan. This plan forms part of the overall year plan.

It is important to note that all four participants rely on planning to achieve their set goals; however, Sonny stands out above the rest in that he makes time to be hands-on in subject teaching. What brings about a difference is how these participants do their planning and how smart they are in being able to implement their plans. For example, Gomolemo alluded to the fact that there are other factors which often make sticking to the plan very difficult. These include unplanned district activities, visits, and meetings. He believed it would be better if the district could send them the district plan well in advance so that they could infuse it into their school plan. This was his response as I probed further:

The issue of protecting the teaching time, that is, to ensure that at the end of the day we complete the ATP's, that is the syllabus. So we can't be playing with that time because all the teachers have got their personal timetables and if they're thoroughly prepared, they'll know what to do in class. So we can't compromise on teaching time. We acknowledge the fact that the annual teaching plans did not take into cognisance things like sporting and cultural activities as well as excursions organised by the district. These activities result in no teaching on certain days.

Gomolemo's assertions on the protection of teaching time are supported by scholars such as Lochner et al., (2015), where they indicate that protecting teaching time is an important resource that contributes to school effectiveness.

5.3.4.4 Challenges experienced

As in many other organisations, every school has its challenges. All the participants reflected on their challenges in line with their roles and responsibilities. Several of these challenges were common, and include learner discipline, late coming, absenteeism and bunking of classes. In this study, the focus is mainly on those challenges that appear to be unique to individual schools. Mathapelo eloquently spoke about teenage pregnancy, vandalism and burglaries, and retrieval of LTSM.

The rate of pregnancy, and the level of pregnancy at this school is very high, and we know that these learners have the right to come to school even when they are pregnant. That affects our percentage pass; I mean, a learner who is expecting a child cannot concentrate 100% on schoolwork.

Sonny also acknowledged that they do experience a challenge of learners who do not return textbooks at the end of the year, but was quick to point out that he had a system that seemed to be working for him.

After learners have finished writing their various subjects at the end of the year, the SGB appoints some parents who will come to the school to help in collecting the textbooks that were issued to learners in that particular year, and if any book has been lost, then the SGB members will refer the learner and the parent to our finance clerk to make arrangements of when they will pay for the lost book or replace it.

Vandalism is prevalent at all the four schools, although the scale differs from school to school, depending on their individual security measures in place. Mosiuwa, Mathapelo and Sonny lamented the level of parental involvement in their schools. Mosiuwa was happy with parents serving in the school governing body (SGB), but would have liked them to possess certain skills, like accounting, plumbing and other professional trades. His sentiments were echoed by Sonny who has resorted to empower his SGB by sending them for training. Mathapelo's lamentations were very loud, from the general parent community of her school to the SGB. Her assertion is that many of these parents do not have interest in their children's education:

Parental involvement ... we have 1 014 learners and our parents' roll goes to something like 800 and something. But when we have general parents meetings we do not even have half of those parents coming to the meeting.

Mathapelo explained that this trend is so chronic that even where these parents are called upon to collect their children's progress reports, the response is still poor:

Even if we say we are not going to give learners their reports, the parents are the ones that are supposed to come and get them, we will remain at school with those reports until the last day of the fourth term.

Gomolemo presented a unique challenge apart from those discussed with the other three participants. He cited difficulty in working with "redeployed" teachers. He felt that this system affected his own personal ambitions and objectives about the school, especially the fact that his school is still growing. He would have preferred to have a choice when it comes to staffing of educators. He had a strong belief that the district office dumped all problematic teachers in his school, whom he was unable to refuse, because he needed teachers. This also related his second challenge, the availability of English home language teachers. Most of those available are swiftly snapped up by suburban schools with promises of various lucrative incentives. So when the district redeploys teachers to his school, they do not fit in with his plans.

Mosiuwa seemed to be irritated by the high teacher absenteeism more than anything else. He alluded to the importance of the leave policy, which he believes is very helpful and allowed him to manage leave in his school; however, his teachers are taking advantage of the seeming gaps they have identified in the policy,

I don't remember setting foot at this school and being pleasantly surprised that everybody is here. On any day somebody is absent.

He felt that this affected all those who are at school, especially him, because he had to ensure that classes of those absent were taken care of, which could become a nightmare, especially when those absent did not report in advance. He explained that they had a relief timetable, but it only helped when teachers reported in time, as opposed to starting a school day only to find that two or more teachers were absent.

5.3.4.5 Success drivers

Gomolemo placed more emphasis on teamwork. He believed that the school climate and collegial relations among staff members propelled them to work even harder and go extra mile out of their own volition. He cited “working together as a team” as key to the success in his school. In this vein, Rosenholtz (1989) opines, “the quality of relationships among staff in a school had a lot to do with the school’s propensity to improve”. This scholar goes further to define quality as the degree of openness, trust, communication, and support that is shared by teachers (Rosenholtz, 1989). She asserts that all these factors promote learning as well as job satisfaction and improve performance among teachers and learners. Gomolemo expressed it thus:

In our school we work as a team. There is that good working relationship among all of us and that is something that I always instil in my educators. Working relationships, because I believe once I have that there will be job satisfaction.

The issue of teamwork resonates favourably among all participants, even though it is expressed differently in each case. However, Gomolemo stands out among the three and is followed by Sonny, who inculcates teamwork by “caring”. His caring involves among other things, supporting teachers when they are sick by sending them messages of support and speedy recovery and showing interest in their wellbeing. He goes further to support his staff during their bereavements, by attending funerals of their deceased close relatives.

I make follow-ups, when a teacher is sick, I would phone if a teacher has been absent for two or more days and I would ask, how he is coping, you know ...

He added:

... that shows them that you care for them, because it is said, "if you want them to work for you, make sure you win their hearts and they will give you their hands". So I think it's important to show that we care for each other, even when there are funerals of their next of kin.

Mosiuwa and Mathapelo did not mention teamwork and their efforts to strengthen relationships in their schools, except where Mosiuwa indicated that every end of the year, they went out as a school to a strategic planning retreat, and team building is one of the activities in their programme. According to Adams and Bailey (1989), it is important that principals take care of their teachers and support staff. This support involves strengthening teacher preferences, enhancing their self-esteem, and self-efficacy, and doing more to promote teacher well-being by improving working conditions.

Sonny and Gomolemo also mentioned incentives, which they introduced in their schools as a way of rewarding outstanding performance of their teachers and learners. In Gomolemo's case, it is about the morning staff teas and coffee as well as having lunch with staff on certain occasions. He added with a glowing face:

As part of my management style, I believe in rewarding performance, not only focusing on IQMS and you know ... but my observation, to say for this week, for this month, my teachers worked very hard, so we reward them. Sometimes have lunch, breakfast ...

In the same vein, as part of caring and incentive, Sonny highlighted the importance of their celebrations, like the Mothers' day, Fathers' day, where they usually enjoy lunch together as a staff. He also pointed to the awards for learners. At his school, the top-performing learners are taken out for lunch at a restaurant like KFC, or orders are placed and delivered at school for those learners.

I'm trying to encourage them and tell them at the parade that I would talk to the SGB that if a class obtained 100% pass, I would organise a free lunch to those particular learners.

He went further to explain that they bought KFC for the best class during the first term, and that worked wonders for them:

We are still going to do it again this coming Monday for our Grade 12s because they have achieved 100% pass.

Several writers support the use of incentives to propel teachers to deliver to the best of their ability (Fryer & Dobbie, 2012; Glewwe *et al.*, 2010). These scholars believe there is a proportional relationship between teacher incentives and learner achievement (Dretzke & Wahlstrom, 2010).

5.3.4.6 Instructional leadership and distributed leadership

All participants indicated that the success they derive in their schools would not be possible without the collective contribution of all involved. These principals concur with global literature that the work of school principals has evolved, and gone are the days of “one-man show”. Consistently, research findings on effective school leadership point to the fact that the ability to lead is not only located in the person of a leader, but may be distributed among staff members (Mulford, 2013; Day *et al.*, 2003; Carter & Klotz, 1990). The four principals, Mathapelo, Sonny, Mosiuwa and Gomolemo, revealed how they share responsibilities with their management teams and educators as well as learners’ representative structures and the SGB, as discussed here under the theme: structures, systems and resources.

Their distribution of leadership confirms the findings of various scholars that “different functions of instructional leadership can be carried out within the following two domains of school management: 1) bureaucratic and structural aspects which directly influence teachers and their teaching. These include formal tasks such as coordinating the curriculum, framing school goals, supervising and evaluating instruction, providing resources, monitoring learner progress and supporting professional development sessions; and 2) Informal aspects which indirectly influence teachers and instruction, and they include the establishment of a conducive and favourable environment where effective teaching and learning can thrive” (Fidler, 1997:33).

Sonny put it like this:

I don't do things alone ... instead I delegate to my deputies, to my HODs and also to members of the SGB, and that makes it easier to accomplish most of my leadership roles ... you know.

Mosiuwa spoke about the magic word, *delegation*. These bureaucratic (formal) and informal structures enable all participants to successfully drive instruction and achieve good results.

5.3.4.7 Target setting

As part of their planning, the four participants highlighted the importance of target setting. Mosiuwa and Mathapelo seemed to follow on the targets set by their district, while Gomolemo and Sonny agreed that their districts had set targets, but they also set their own as individual schools. Gomolemo vehemently said:

We also have strategies for improving performance for every teacher in Grade 12 especially, based on the previous year's results. They must tell us how they are going to improve their results. It does not matter whether the person got 100% in Setswana or maybe English. In that case we say, yes you got 100% but in terms of quality we are not happy.,

His assertion is based on his belief in excellence, as he put it:

and I always strive for excellence even if it's difficult, but I strive. Excellence because I believe this is a school where proper teaching and learning takes place.

His sentiments were echoed by Sonny, who also believes in excellence without compromise. He demands a 100% pass from both learners and their educators. He related to me how he was able to sell this belief to all stakeholders in his school including the parents of the learners, with great success. This is enhanced by the fact that he encourages teachers and learners to generate an inspirational motto every year. According to him, this motto generates a lot of enthusiasm, and propels everyone to work harder in order to meet the set targets. This point is also emphasised by Monzani, Ripoll and Peiro (2015:3), who argue that where goals are set in a more participative way, followers are motivated to contribute their ideas as to how tasks should be executed.

Below is a table that gives a general summary of areas of common interest and difference among all the participants. My approach has been to align the data in the table to the themes discussed in this study: see table 5.3 below.

Table 5.3: Summary of similarities and differences

Description	Similarities	Differences	Paragraph in the text
Policies are enabling	All agree	All emphasised different policies for different areas	4.2
Training provided on policies	All agree	Gomolemo is the only one well trained	4.4.3.3.1
Instructional leadership practice	Espoused by all	Focus is more on Grade 12 Sonny is the only one teaching	4.4.4.3.1
Distributed leadership practice	Employed by all using structures in their schools	None	4.4.2.1.2
Daily activities	All agree that there is a lot to be done every day	There is no common system. Everyone has to define their own	4.4.2.1.3
Extra hours	Applied by all	Mathapelo and Mosiuwa have night shifts at school	4.4.4.3.3
Psycho-social impact of work	All complained that their families suffer	None	4.4.4.3
Balance	All able to achieve balance	Different ways employed	4.4.4.3.3

5.4 DISCUSSION SUMMARY

Mr Sonny presented himself as a success-hungry leader who has his roots deeply entrenched in instructional leadership. He epitomises the deeper meaning of instructional leadership as highlighted by several scholars. A leader by example who believes in leading from the front, understands his role very well and is focused on curriculum delivery and learner achievement, driven by a clear vision and mission of the school. He teaches two classes, one being Grade12, but he still finds the time to manage his school so well that he even attains excellent results. The fact that his school has been doing well over the past five years indicates consistency and effectiveness of the structures and systems he established.

Sonny's work is exemplified by the meaning he derives from the education department's policies and regulatory frameworks, which he follows religiously to the letter. His reliance on these policies does not come without challenges. He specifically

pointed out the policy on the progression dispensation of learners, and the Multiple Examination Opportunity (MEO), which he believes, has good intentions if all parties understood it equally and were in agreement. It is however sad to note that as a school principal, he is left alone to ensure that all parties have a mutual understanding of the whole process. This proves to be difficult for a number of school principals, as he pointed out, because learners and parents tend to renege on the agreement they entered into when the learners were progressed from Grade 11 to 12 even though they did not satisfy all the pass requirements. He vented as follows:

When I call parents to come and discuss the issue ... they eeerr ... don't come smiling. On that day they sing a different song. It is no longer the same parents who agreed to sign the agreement to allow their children to progress to Grade 12 even though they did not meet the full pass requirements (for Grade 11). They forget that they agreed to do this. But now I am left alone to ensure that they comply ... Eishh!!!

He goes out of his way to engage all stakeholders in whatever he does. Apart from the school management team (SMT), he mentioned a few structures to which he is able to distribute work, and these collectively enable him to have time for the many activities in his school. There is the LTSM committee which looks after resources for both educators and learners, the Faith Based Organisations which he asserts, help with moral regeneration in the school, thus assisting with learner discipline. The SBST, which also works together with other NGOs and partners, is very critical in that for the most part, deals with all the socio-economic challenges of the learners in the school.

Mr Sonny, unlike Mathapelo, Gomolemo and Mosiuwa, did not stop talking about his ICT coordinator and his team, who he said assisted him with analysis of data using the departmental software called SA-SAMS. Using a programme called the dashboard, he is able to comparatively scrutinize all learner performance across all grades, which alerts him to red flags when they emerge. Sonny is then able to use this data to drive change in relevant areas of need. This resonates well with the United States Department of Education's *No Child Left Behind Act* of 2001, which made it compulsory for schools to use data in order to support their decisions. This was vividly summed up by Spellings (2005:1):

Information is the key to holding schools accountable for improved performance every year among every student group. Data comprise our best management tool. I often say that what gets measured, gets done. Once we know the contours of the problem, and who is affected, we can put forward a solution. Teachers can adjust lesson plans. Administrators can evaluate curricula. Data can inform decision making, thanks to No Child Left Behind, we're no longer flying blind.

Data generated from this analysis also assist him to make informed decisions as to the types of interventions needed to correct the situation. It also makes it easier for him to share this information with parents during parents meetings. This data-driven approach to instructional leadership enables Sonny to keep his pulse on the learner achievement and the success of their intervention strategies. The other three participants did not elaborate on how they do their data analysis; however, the common thread amongst all of them is that they use data to make decisions.

Sonny also mentioned a myriad of activities they are involved in, which seek to improve and sustain their enviable record of achievement. These range from strict monitoring of teaching and learning, with control systems like accounting sessions and checking of learner books, to celebration of success. He also emphasised the importance of extra hours during the week, as well as over weekends, and school holidays, where extra classes are conducted throughout.

Gomolemo was very proud of his school's progress since he arrived and was determined to do even more. Having started with 95% pass rate in 2012, Gomolemo demonstrates strong leadership anchored in distributed leadership, and promotes collegial human relations, sharing of responsibilities, and an environment which supports effective teaching and learning. He aptly demonstrates that leadership is based on the premise that all teachers can and must lead, as Bath (2001:85) argues.

Mr Gomolemo is fully aware of his primary role as the instructional leader at his school, a task he executes with pride and ethical responsibility. Establishing suitable conditions for productive learning is at the centre of all his planning and deployment of human resources. As a former district official, he understands policy and is well equipped to interpret it with a degree of comfort. He appreciates all legislative frameworks provided by the education department, without any complaint.

Leading an English home language school in a township began as a challenge for his school, because most learners in his neighbourhood often register for their own African languages as home language. Thus it was hard for him to attract learners to his school. The new policy on admissions brought him a lot of excitement, where applications are now made online, and the department then allocates and places Grade 8 learners according to their home addresses. This favoured his school, compared to those in town, and his learner enrolment almost doubled within a short period of time. This new admission policy is very helpful as it ensures the future existence and development of his school, and allows his school to grow in all respects. The online registrations also reduced a lot of administrative work which were normally done by him, thus allowing him to allocate more time to other imperatives like instructional leadership and governance.

He also mentioned the learner attendance policy, which he said enabled him to keep tabs on all those truant learners who stayed away from school, and performed badly during assessments. He is able to link learner attendance with performance through the analysis of results. This allows him to intervene timeously and remedy the situation before it affects the end-of-year performance. According to DuFour *et al.* (2009), one of the critical functions of school principals is to evaluate teacher performance and come up with developmental programmes that are aimed at teacher effectiveness and performance improvement. This can occur in various ways, including the PLCs mentioned above, formal and informal training, establishing study groups, and personal mentoring of good practice, among others (DuFour *et al.*, 2009).

Mrs Mathapelo acknowledged the importance of departmental policies and their implication for her and the school community. She was able to mobilise the SGB to generate and update school policies as mandated by the *South African Schools Act* (SASA, 1996). SASA mandates SGB's to among other things, draw up school policies including learners' code of conduct.

Mathapelo was not happy with two policies which she thought were making her job somewhat difficult. The first one is the policy on working hours. When she wanted to extend school hours she met serious challenges from teachers, who did not like the idea of an extended school day. Her discomfort with this policy stems from the overall

understanding and interpretation of this policy, which talks about minimum working hours. The attached is an extract from the *Employment of Educators Act* (RSA, 1998).

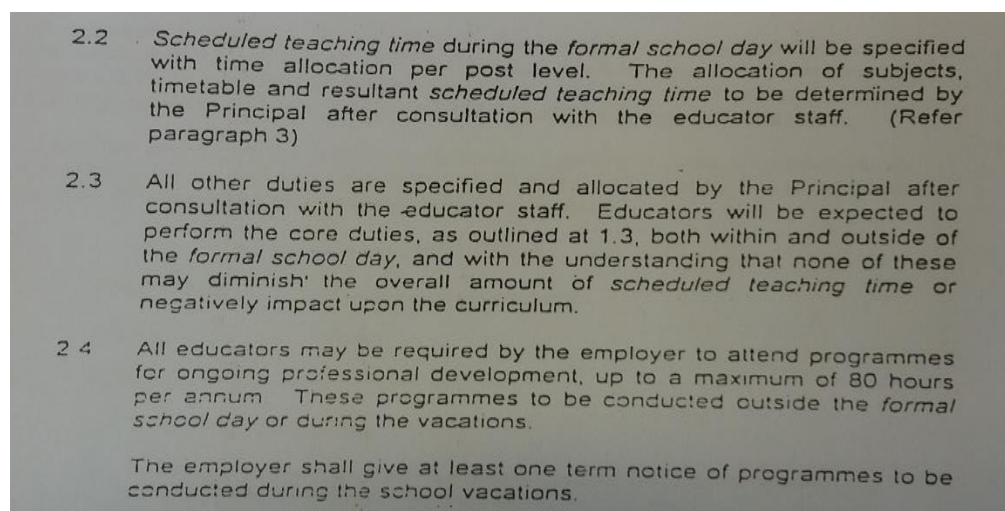


Figure 5.1: Extract from the *Employment of Educators Act*

Paragraph 2 of this extract in 2.1 states clearly that a teacher is expected to be at the place of work for not less than 7 hours. It therefore sets a standard of minimum hours to be spent at work and does not rule out the possibility of extended hours, as indicated in 2.3. This policy therefore allows Mathapelo to have an extended school day programme, provided there is mutual agreement with teachers. Even though she raised it as a concern, she was upbeat about the extra hours they put in to achieve their success.

Another policy she mentioned was about the redeployment of teachers, which she complained affected her choice of teachers working at the school. She specifically had concerns about teachers who qualified to teach in primary schools but who were being deployed to secondary schools. The point she raised is that such teachers were not versatile to teach any grade in the high school, but were confined to Grades 8 and 9 only. This affects her allocation of duties to teachers since she always has to ensure that such teachers are not moved around. However, she indicated that she was able to make up for the shortcomings by seeking the services of volunteer teachers from the community who were still unemployed.

When looking at the systems and structures in her school, she showed her willingness to share responsibilities with other staff members, also considering that she highlighted

the heavy workload she has. She has divided sections of the school according to the SMT members and is therefore able to manage better by monitoring and following up on the deputy principals' reports. This allows her the time to focus on some of the pertinent issues and to attend meetings outside the school.

Scholars such as Hoadley *et al.* (2007) report that principals in South Africa spend most of their attention and time on administrative functions and disciplining learners. They also agree that the majority of principals' actions on instructional leadership in terms of overseeing teaching and learning and supervising teachers were still lacking. These sentiments are evident in Mosiuwa's narratives in terms of spending more time mostly on administrative tasks, hence he complained about too much paperwork. However, he is hands-on when it comes to instructional leadership where he confessed that he maintains visibility by walking around and ensuring that teachers are in classes and teaching.

Mosiuwa alluded to taking time to read all departmental policies before he mediates them to his staff for implementation. His interpretation of these legislative guidelines enables him to manage the school according to the prescripts of the education department. He generously explained that he distributes different tasks to his SMT members, whom he calls principals of their sections. *The Employment of Educators Act* (RSA, 1998), which gives the official job descriptions of teachers according to different post levels mandates him to delegate duties accordingly. He also uses this legislation to allocate some of his functions to deputy principals.

Another policy he mentioned is the sick leave. Here he indicated that the policy is important and helps in keeping educators' presence at work in check. However, he indicated that some of the regular absentee's in his staff have developed a way to circumvent compliance with this policy.

This section of the act provides for teachers who go absent for three or more days to submit a medical certificate, but it does not preclude those who may be absent for fewer than three days, as explained in the next paragraph:

... the employer establishes a pattern/trend in the employee's utilisation of normal sick leave, the employer must require the employee to submit a medical certificate

from a practitioner or person listed in paragraph 17.1 hereunder, for periods of sick absences of less than 3 days (DPSA, 2012:22-24).

Concerns raised by Mr Mosiuwa with this policy may reflect more on his interpretation and not on its gaps. I believe this policy plays a very important role, except as he has said, it needs to be implemented with utmost care, and requires strict monitoring and recording of leave taken by all his educators. The policy adds value to his work and allows him to treat all his staff equally using the same standard. In as much as he has delegated certain functions to SMT members, he could do the same with management of leave in his school. This would make it easier for him to focus on instructional leadership and other managerial duties, and therefore achieve a balance in his work.

Mosiuwa also finds the promotional requirements for Grade 8 and 9 helpful, as they allow him to entrench high standards on learner achievement. He made it a culture at his school to mediate and share these requirements with parents of Grade 8 and 9 learners. He is not comfortable with the pass requirements for the FET phase, Grades 10 to 12. He feels sabotaged by the department when the pass conditions are dropped. He would have preferred the continuation of same up to Grade 12. His view is that learners tend to relax when they reach matric, thinking that they would pass with relative ease, which more often is not the case. Some learners do not make it even with the low minimum requirements for a pass at Grade 12.

The next chapter presents a summary of all the major findings, recommendations and conclusion from the narratives of the four principals.

CHAPTER 6

FINDINGS, RECOMMENDATIONS AND CONCLUSION

6.1 INTRODUCTION

The position of a principal at a school has become very complicated and very demanding, due to many evolving trends in education. Scholars such as Fullan (2018) who have been following the changing trends are adamant that the part played by the school principals has itself evolved, transcending from being instructional leaders to transactional leaders and lately transformational leaders. South African school principals still battle to come to grips with instructional leadership as a formal practice that is key in their positions (Spillane, Halverson & Diamond, 2010). This study sought to understand and unpack what it is that principals do in their schools on a day-to-day basis in the name of management and instructional leadership.

As I read for the study, I did not come across research that employs a multiple case study to understand how school principals go about their dual mandate as managers and instructional leaders, and how they negotiate the balance between the leadership, management, and instruction in South African schools. By using a multiple case study, I was able to gain an in-depth and comprehensive understanding of how principals achieve or fail to achieve a balance as they go about their day-to-day duties at their schools.

During the four days I spent at each school, I followed the principals in all activities they engaged in, such as assemblies, morning briefings, meetings with staff, meetings with parents, district officials and community members. I also accompanied them while they took rounds in the blocks of classrooms monitoring teachers as they engage with learners. This allowed me to observe how they went about their day-to-day roles in balancing leadership, management, and instruction. The following research questions were key in driving this study:

- What are the policies that inform the work of school principals at South African schools and how do they make sense of these policy guidelines in their day-to-day work?

- What structures and resources do school principals rely on to carry out their dual mandate of management and instructional leadership in schools?
- How do principals go about their day-to-day practices of leadership and management of schools and how is the balance achieved, if at all?
- How can we explain the success of some principals with regard to the challenge of balancing management and instructional leadership in their schools?

6.2 AIM OF THE STUDY

This study sought to explore how principals go about their dual mandate as instructional leaders and managers in South African schools. Pursuant to this aim and research questions, the study established if there were structures and resources in schools that contributed uniquely to the principals in carrying out their dual mandate. It was therefore important to first look into all the policies that enable and direct principals in their work. The analyses of these policies, structures, and resources was discussed in Chapter 4 of the current study.

The study also sought to unpack some of the strategies that school principals employed to manage and lead their schools. Furthermore, due to the rather wide scope of the work of the principals, as articulated by all participants in this study, and also supported by various scholars, there was a need to find out how these principals were able to achieve a healthy balance, if at all, in the process of doing their work. The study therefore sought to illuminate the success of some principals in balancing management and instructional leadership in their schools.

6.3 OVERVIEW OF THE STUDY

With a sample of four school principals, who were purposively selected from two provinces, Gauteng and the Free State, the objective of investigating how school principals go about their dual mandate as managers and instructional leaders was pursued. The study was triggered by my own observations and interactions with school principals, as a principal myself, where I noted several principals performing tasks,

some of which I believe, could be delegated to other members of staff without compromising the ability to lead successfully.

These tasks include, among others, time-tabling, capturing of learner marks and generating promotional schedules, and chasing late comers at the school gates, yet they complain that they had a lot of work to do in their schools. While trying to make sense of their behaviours, I came to realise that the principals are compelled by the notion propagated by their own leaders at the district level, where they are often called to lead from the front. To many of them, leading from the front meant being involved in everything that happens in their schools.

Through this study I was thus eager to understand better my own work and that of my colleagues, guided by lenses of instructional leadership and distributed leadership. I was also persuaded by the discovery that there is limited literature available to support school principals in this regard at a practical level. The outcomes of this study are presented in six chapters as discussed below:

Chapter 1 Introduced the study, beginning with the background and presenting the problem statement, aims and objectives of the study, the research questions and methodology. The chapter also touched on the value of this study and the potential contribution it will make in the field of school leadership, management, and instructional leadership.

Chapter 2 Presented an intensive literature study with special focus on school management and instructional leadership. It also provided the reflective tool for analysing the data, based on practices of school principals as they go about their day-to-day activities at work. To this end, I explored various aspects of leadership, guided by the frameworks of instructional leadership and distributed leadership, which I used as lenses through which this study can be viewed. I reviewed studies from various countries such as the UK, Canada, China, South Africa, and the USA, among others.

Chapter 3 provided the research methodology that was used to collect data and how the data were analysed. The study followed a qualitative research methodology, with a multiple case-study design. Extensive data sets, at the micro-level, necessary to respond to the research questions were collected through observations, interviews, and documents analysis.

Chapter 4 then provided insights into the data collected, presenting narratives from my interviews with school principals and from the document analysis. A further analysis of policies that guide the work of principals and the structures they use were discussed, and narratives constructed. It emerged that school principals experience a myriad of challenges with the implementation of some of the departmental policies, sometimes due to a lack of understanding and/or misinterpretation. A number of findings from other scholars were also confirmed from the practices observed. The narratives of principals were analysed, interpreted and linked to the literature reviewed in Chapter 2 of this study.

Chapter 5 presented a cross-case analysis of the four case studies. The analysis revealed some similarities as well as the different patterns of practices, actions, activities and roles. The findings of the study are presented, guided by the following themes that emerged during the analysis of data in Chapter 4: (a) policies that guide the work of school principals; (b) Structures and resources that enable principals to function effectively; (c) Day-to-day activities of the principals; and (d) Achieving a balance. The chapter concluded with a summary and interpretation of the findings guided by the literature review.

Chapter 6 follows on the summary of findings with some key recommendations, and limitations of the study, as well as its contribution and value to research and scholarship in general. Answers to the proposed research questions are also presented in this chapter, including the recommendations for further study.

My investigation employed the qualitative research approach which, according to Minichiello and Kottler (2010), enabled me to focus on contexts and situations without expecting to find objective and universal explanations on why school principals engage in certain behaviours and practices. A qualitative approach was also helpful in seeking insights and explanations on how principals made sense of policies and legislative frameworks, as well as structures and resources at their disposal to lead, manage their schools, and achieve a balance. I opted for a multiple case study as my qualitative research design, because it allowed me to indulge in each participant's space where I spent four full consecutive days, followed by sporadic afternoons, weekends, and school holiday visits. During this period I observed and engaged with principals about

their work, shadowed them as they went about their dual mandate of balancing management and instructional leadership in their schools.

6.4 SUMMARY OF FINDINGS

The findings of this study reveal that a number of instructional leadership activities, which are normally taken for granted, occur regularly at schools. It is also important to acknowledge that most of what principals do in their efforts to ensure the success of their schools is often not spoken about. Many scholars have cast their attention on how to succeed and on strategies of managing different systems in schools, but only a few, if any, have paid serious attention to activities, practices and actions that school principals engage in on a fairly regular basis, especially in South Africa. Most research tends to focus on once-off or exceptional moments in the principals' routines.

It needs to be emphasised here that previous research on school leadership has mostly portrayed leadership according to the way teachers and principals viewed it. Few studies have made significant efforts to unpack the practices and actions of school leaders generally in developing countries (Jita & Mokhele, 2013). Hence this study sought to map-out principals' narratives on balancing leadership, management and instruction in South African schools. As Jita and Mokhele (2013) further assert, subject-specific instructional leadership is one area of research that has not been explored at all. Most of the research in South Africa has focused on formal leaders or positional leadership, often without attention to their role in instruction.

Narratives of school principals in South Africa are rare, particularly on how they execute their duties on a daily basis as they go about their functions and roles in order to achieve a balance. Principals have to juggle around various roles, which include acting as human resources managers, where they attend to the staff needs of their schools, administration, to attending to the security details, and most importantly ensuring that there is a conducive environment suitable for effective curriculum delivery. Such actions and activities are informed mainly by the policies that guide the principals' work, as discussed in Chapter 4 of this study, and with all participants. What is of paramount importance and interest here is their efforts in ensuring that they are able to cover all bases of their work as prescribed in their job descriptions without

sacrificing others. The following major findings came out of the data analysis and are presented according to the themes derived from the data:

6.4.1 Main findings

6.4.1.1 Policies as constraints and enablers

Many scholars believe that in order for the principal to be seen and be appreciated as an instructional leader, he/she must be able to be a practitioner of teaching themselves-thereby leading by example. This, however may be diminishing fast as a practice and is becoming practically impossible for many school principals, due to the ever-changing demands of their work. This study has established that most principals are indeed aware of this policy imperative, even as they found it difficult to comply with, thus confirming the findings of Reese (2013:323-324) when he states, “Progressive ideas are easier to proclaim than act upon.” Only one principal in this study, Mr Sonny, was able to teach a class, even he himself confessed that it was not always easy for him to satisfy the demand and policy imperative.

Literature reviewed in this study found that although some scholars believe that the physical involvement of the principal in instructional leadership includes teaching duties, most of them emphasise the strategic leadership of principals throughout the schools. Hallinger and Murphy's (1985) model of instructional leadership proposes three key dimensions, which are, (1) defining the school's mission, (2) managing the instruction programme, and (3) promoting a positive school climate conducive for learning.

Policies – both school and departmental, are critical tools that enable school principals to execute their duties. However, it emerged that most of the participants were struggling to interpret and implement these policies effectively and uniformly. This inconsistency in policy application creates a lot of conflict among educators and school principals. This often results in many policies that are misinterpreted and misunderstood being partially implemented and/or totally ignored by school principals.

This study found that all school principals relied on the education departments' policies to exercise their leadership roles. In the same breath, the current study established that some of these same policies made the work of principals more complicated and

difficult. Examples cited in this study came from all the four principals, even though each of them were differently affected by the policies. Mrs Mathapelo for instance, was very concerned about the rate of teenage pregnancy, where the policy directs that such learners should be allowed to attend school even in that condition. The pass requirements also came under scrutiny, where all participant principals lamented the ‘dropping of standards by the education departments with regards to the FET phase.

The other policy that impacted the work of principals in a negative way is the *Employment of Educators Act* (RSA, 1998), where it talks to the working hours of educators. Principals found it difficult to convince the teachers in their staff to work extended school hours as part of their strategy to improve results. It took a lot of effort for principal Mathapelo to convince and gain the backing of her educators before she could proceed to offer extra tuition for the Grade 12 learners. On the other hand other participants did not experience problems at all with the same policy.

In a nutshell, the policies on which the principals rely appear to represent a mixed bag, with some providing more of an enabling context for them to balance the management and instructional leadership demands with some degree of success. The same policies, however, sometimes compound their ability to successfully navigate this balance in their schools. The PAM document chapter 4 paragraph 4.3 (iii) for instance states:

Teaching

- “To engage in class teaching as per the workload of the relevant post level and the needs of the school.
- To be a class teacher if required
- To assess and to record the attainment of learners taught” (EEA, 76/1998).

This part of the act specifically directs principals to engage in class teaching, as part of the eleven core duties and responsibilities of their job. While the act acknowledges that principals occupy different post levels, depending on the size of their schools, it is important to note that even those principals on post level 4 (the highest but one level), are still expected to teach a minimum of 5% of the scheduled teaching time (EEA, 76/1998). Three of the participants in this study are on post level 4 (P4), and one is on

P5. The size of their schools is big hence they found it difficult to comply with this policy. Another example, Mosiuwa and Sonny came out strongly against the policy on modularisation of Grade 12 learners, where they found it difficult to convince learners and their parents about the subjects they were going to write in the final year end senior certificate examinations. Hence Spillane *et al.* (2002:395) argue that

policy implementers can fail, not because they are unwilling to implement, but perhaps their ability to implement is hampered by the extent of their understanding that do not align with the policy-makers' intentions. The role of human sense-making can easily contribute to unintentional failures of implementation.

The major determinant on whether and how the policy enabled or constrained their quest for a successful balance in their work seems to be their interpretation and sense-making of both the prevailing conditions at their schools and the scope and directives of the policy at hand. Such sense-making, as Mokhele and Jita (2013) assert, is often enhanced through training and continuous professional development (CPD). Inexperienced principals often find policy interpretation and implementation difficult, precisely because they are appointed before they could be trained on such policies, and even after their appointment as school principals, the training they receive is mostly haphazard and fragmented.

According to the Government Gazette No. 39827 (RSA, 2016), it is imperative on the Department of Basic Education (DBE) to provide training and guidelines to school principals on the different aspects of their professional duties. This training includes among other things, policies and legislative frameworks, their understanding, interpretation and implementation. It is however important to note the discontent that continues to reign among school principals, as highlighted by the findings of Bantwini and Diko (2011). These scholars found that many school principals were not satisfied with the capacity building initiatives they received from the education departments.

The findings discussed in this study also suggest that there is mounting pressure that is being exerted perhaps inadvertently on school principals to focus on matric (Grade 12) learners' performance. This was articulated in various ways by all participants in the study. The pressure was evident in, firstly when the principals narrated their strategies for success, where they automatically spoke about Grade 12. The pressure

to complete the syllabus by the end of June came out clearly, and it was also reflected in their plans. The second part of this pressure is about learner performance. Every school principal wanted to ensure that they were able to meet the set targets (Araujo, 2017).

The fact that all principals interviewed indicated that they were prepared to delegate other grades within their schools to the members of the school management teams (SMT) except Grade 12, simply indicates the magnitude of pressure experienced by the principals. The main reason the principals cited for this bias, is that they needed to ensure that matric learners achieved according to expected targets set by their districts, and provinces. This affirms the findings of Mestry and Naicker (2013:12) that,

if distributive forms of leadership are integrated into the complementary vertical leadership structure of schools, and structures such as networks can be introduced, the principals' role can more easily become that of a facilitator, mediator, coach and supporter, thereby encouraging a more collegial school atmosphere.

These findings also suggest that lower grade learners (Grades 8–9) are generally neglected in schools, only to be taken seriously when they reach Grade 10. This is quite interesting, because Grade 10 is a stage where learners start choosing subject streams that will direct and prepare them towards their career choices. It is important to note that, in order for these learners to choose appropriate careers, they should have been taught and properly assessed so that their strengths could be identified and enhanced in the junior classes. The impact of this practice has always been evident, where many learners would choose wrong subjects, and consequently inappropriate careers.

This study has found that the principals have accepted the challenge to devote much of their attention to Grade 12 learners while trusting their colleagues to do justice to the lower grades. On the other hand, this reflects a lack of trust on the part of school principals that if they take ownership of Grade 12, then they will be able to get the expected outcomes. Instructional leadership is quite diverse and indeed comprehensive. The fact that principals decided to physically handle everything related to teaching and learning in Grade 12 points to a whole range of issues which need further investigation. The education districts place so much pressure on the

principals to produce good Grade 12 results, that they make it necessary for them to directly focus their attention on Grade 12 learners.

This has created a certain level of animosity among schools as they are always in competition with each other. Each school develops strategies which enable them to produce good results, and staff members are cautioned not to divulge any of their plans and strategies to anyone. When looking at the narratives of all participants, I realised that some of the strategies were never mentioned by the principals during our discussions, but came out inadvertently during observations and random visits to the schools. It is therefore not surprising to find most schools working in silos and being very secretive in sharing with others that which drives their success.

The findings also point to the lack of consistency and coherence of systems in schools. Each of the participants operate on their own, and their operations do not follow any particular pattern. Their activities are mostly a reaction as opposed to being pre-planned, and in line with their different school plans. Principals shared narratives of how they went about doing their planning, which they said was done in advance for the next year. Sticking to the plans however, was not easy due to numerous challenges they faced daily.

This came out several times during interviews when participants lamented their inability to attend to their classes and offer lessons due to a myriad of reasons, which include, inter alia, attending meetings called by the education departments, and random visits by parents and community members. Most of the time these visits occur without any appointment and at short notice. To make matters worse, there are also parents, business, and community structures who also visit the schools for one thing or another. All these people visit the schools sometimes without making any prior arrangements with the principals, but demand their attention.

Variations in terms of policy implementation in participating schools may be a classic example of lack of understanding and/or inadvertent misinterpretation of policies by school principals. Research on implementation also argues that “departmental policies are seldom implemented as written or as intended by their initiators” (Ganon-Shilon & Schechter, 2017:4). The arguments raised above bring about the question of policy interpretation and implementation. According to Brynard (2010:194), policy

implementation relies more often on human sense-making, which may lead to failure in its implementation due to conceptualisation of the particular policy by the implementers. This scholar goes further to emphasise the individual's cognitive and normative frames and how they relate to attitudes, beliefs and interests. She asserts that individual implementers are often guilty of prioritising policies that are consistent with their own interests and agendas.

According to Mohammed (2001:414),

policy implementation can be affected by two main types of influence. The first type being the informational influence or internalisation of an individual's private beliefs, and the second type of influence is the normative influence or compliance to yield results without accompanying changes in attitudes.

These scholars also point to human sense-making as a possible contributor to the unintentional failures of implementation. This study can therefore assert that in order for the school principals to be successful in policy implementation, they need to be capacitated in the knowledge, but most importantly, they need to work on their cognitive and normative frames.

6.4.1.2 Aligning structure and function for balanced school leadership

The structures that exist in schools are essentially meant to support and promote curriculum delivery and instructional leadership. Most of these structures are statutory and therefore common in all secondary schools in South Africa. This study found that school principals made use of the existing structures in their schools mainly to extend their authority and also to shed some of their responsibilities. All participants showed willingness to share roles with their fellow management team members, SGB, RCL, and school committees. However the current study established that while these structures were active in all of the participants' schools, they did not function in the same way. Some tasks were performed by the SBST in one school, only to find the same being done by SMT, SAT, or any other committee in another school.

The National Curriculum Statement (NCS) outlines the roles of structures necessary to ensure effective instruction in schools (DBE, 2019). In the same vein, this study suggests the need for realignment of all structures inside the schools, and clear

articulation of specific tasks to be performed by each, in order to support the instructional leadership initiatives of the principals. These findings also corroborate the findings of Bottoms and Fry (2010) where they argue that there is a need for structures in schools to be interconnected and operate as a unit in order to collectively make a bigger impact on learner achievement.

The functioning of these structures and lack of coordination is a reflection on the capacity of members to carry out their duties. Education departments need to prioritise professional development of teachers through the operational structures within schools. This will encourage more teachers to participate and strengthen the Professional Learning Communities (PLC's), where such training will be focusing on specific instructional leadership tasks of each and every structure.

It also emerged from this study that the effectiveness of these structures and devolution of their scope of work depends entirely on the school principals. This brings into focus the managerial skills and subsequent bias of some principals, where more important tasks may often end up being allocated to certain preferred and favoured structures. Hence, the same structures were found to be engaging in different activities among the chosen schools. The functionality of structures within schools is also anchored on the distributed leadership model adopted by the principals. According to Yan, Dillard and Shen (2012), there is a need for a mutual trust among members of the school management teams. The principals need to trust their colleagues, and ensure that they gain their 'buy-in' into the set goals of the schools and those of the education departments.

In their findings, Bottoms and Fry (2010) also confirm that education departments through their districts have failed to generate guidelines that empower school principals to focus their attention on instructional leadership. The availability of proper guidelines and correct implementation of policies may go a long way towards eradicating some/or all of these stereotypes and challenges. In a nutshell, what is lacking at schools in order to enable the structures to perform optimally is: (1) alignment of instructional leadership tasks, (2) support and professional development by education departments, and (3) policy review to assert principals as instructional leaders.

6.4.1.3 Practices of school leaders: instructional leadership and the supervision of “curriculum delivery”

The study established that the activities of the principals were geared towards promoting instructional leadership, and that key among these tasks are setting achievable goals and targets, strict monitoring of learners’ work, sharing of responsibilities with other staff members, and liaising with other major stakeholders. The involvement of school principals in instructional leadership activities, where they support their teachers appears to be haphazard and lacks clarity. Their main focus is on Grade 12 classes, where they seem to be comfortable, and relegate the lower grades to the other SMT members under the leadership of deputy principals.

All participants reported good knowledge and understanding of their roles, and all of them highlighted the importance of curriculum delivery as their core business at their schools. Several authors agree with the findings in the instructional leadership literature that school effectiveness is contingent on the principals’ focus on classroom instruction (Blasé & Blasé, 2000; Hallinger & Heck, 1998).

The study found that the term *instructional leadership* is not as popular among all participants. In fact, all participants were more inclined to refer to what they were doing as ‘curriculum delivery’. However, when analysing their actions and practices it was evident that they were instructional leadership practitioners, and they were not aware of it. This is simply because their education districts were mostly talking about curriculum delivery, which is but one component of instructional leadership.

6.4.1.4 Balance

Proper planning and communication of all activities of the district offices need to be shared with schools timeously. This will enable the school principals to do their annual planning in advance before the start of academic year in order to align all the year’s activities into one comprehensive plan that includes activities of the district offices. In order to remain on top of their game, the principals in this study, reserved some of their activities for after hours. These activities mostly include extra classes, staff and other meetings, as well as administrative tasks.

Time on task also came out strongly, where there were concerted efforts among the schools to start the school day on time and ensure that every teacher and learner attend lessons promptly, and teaching and learning occurred without hindrance. The narratives show that success does not carry a price tag, considering how much time and resources principals have invested in their schools' achievements.

The balance is also influenced by the principals' creative practice of distributed leadership combined with instructional leadership, where they share some of their responsibilities with the structures they have at their disposal, such as the deputy principals and heads of departments among others, thus affirming the findings of other scholars that next to teaching, the school leader is a key lever at every school (Hallinger & Heck, 1998; Leithwood *et al.*, 2004; Supovitz, Sirinides & May, 2010; Waters, Marzano & McNulty, 2003). Furthermore, empirical evidence produced in recent years also emphasises the importance of instructional leadership to the professional practice of school principals (Hallinger, 2011; Hallinger & Heck, 1998).

The sharing of responsibilities varied from school to school, and depended entirely on the individual principals' delegation skills. It was through observations at different schools that a comparison was made, where it was established that at certain schools, some tasks were delegated to deputy principals, while at other schools, such tasks were performed by heads of departments or school committees. This is a reflection on the school principals and suggests a whole lot of issues which may need to be investigated further.

6.4.1.5 Psycho-social effects

Many principals suffer in silence, mainly due to the fact that they are the accounting officers in their respective schools, a fact they all acknowledge, but which carries a lot of responsibility. In most of their narratives, participants spoke about the time they spent at their schools. Also, when compared with observations and documents collected, principals demonstrated their hunger for success and their determination to succeed at all costs. The actions of these principals unfortunately have a very negative impact on their state of health and social life in general. They tend not to share their frustrations openly, because they are afraid of being viewed as failures or weak.

A classic example is Mr Sonny who teaches two classes; he carries some of his work home, and is able to meet most of his work commitments, but struggles to have time for his family, as he stated. He alluded to the fact that he left school very late in the evenings, and was always there over weekends and during school holidays. The other participants also weighed in where Mosiuwa and Mathapelo also cited their evening study and teaching programmes, compelling them to sleep at school on certain days, as outlined in their roster. The actions of all these principals indicate a desperate situation they find themselves in, where they have to pull out all stops to ensure that their schools remain successful. It is therefore natural that in the long run, these principals and their teachers will soon suffer from burn-out.

The health and mental status of school principals as well as their social lives may need to be investigated further in order to develop mechanisms to support them in this regard. While the Education departments have made the Employee Assistance Programme (EAP) available to all educators, the principals find it difficult to engage in it due to the reasons I have already alluded to above. They feel that rather than being seen as weak, they better maintain a brave face at the expense of their dear health. This study therefore recommends immediate intervention from those in higher offices to come up with ways of supporting school principals as individuals, without exposing them to public scrutiny.

6.5 INSTRUCTIONAL LEADERSHIP

Classic scholars laid a solid foundation when they developed three theories on conditions that shape the behaviour of instructional leaders. The theories include: the adaptive-reactive theory, expectancy theory, and the role theory (Khan & Rosenthal, 1964; Pfeffer & Salancik, 1975). These scholars believed that the behaviour of the school principals' leadership is influenced by the perceptions of how people expect the leaders to behave. Consequently, principals also think of their role as being influenced by prescriptions, such as job description, day-to-day requests, and instructions and directives from their supervisors and the education departments. This also came out in this study, where principals complained of not having time to lead instruction due to department officials and parents and community members who visit their schools unannounced and without appointments.

In a review of school leadership practices within an international context recently carried out in eight regions, Alberta (Canada), England, Ontario (Canada), New York (United States), New Zealand, The Netherlands, Singapore, and Victoria (Australia), the findings indicated that high-performing principals did not work more extended hours than other principals did. However, they spent more time with other people in their schools, where they maintained high visibility in the corridors, spending more time coaching and motivating teachers, interacting more often with the parents and other stakeholders, and spending time with students (Barber *et al.*, 2010). These findings contradict the observations in this study, where all participants had to work extended hours in order to achieve a blank in their work and, most importantly, produce the good results they consistently produced over the years. The current study has also shown the efforts put in by these principals, focusing on Grade 12 classes only. It therefore brings into question the amount of time and effort that they will need to lead instruction in the whole school.

Another review of leadership in various national settings, which also looked at the principals' time allocation, found that the way in which principals utilise their time can be affected by societal factors such as economic, sociocultural and institutional features of the particular systems in which they operate (OECD, 2009).

The Teaching and Learning International Survey (TALIS) involving 23 countries conducted by the OECD, found that while varying degrees of instructional leadership exist in different national settings, school leaders who adopted a stronger instructional leadership focus were associated with more collaborations between teachers, more positive teacher-student interactions, and greater recognition of teacher innovation (OECD, 2009). On the other hand, in their earlier report, the OECD (2008), based on a study involving 14 countries' school leadership practices and policies, the report recommended the following four levers for improvement (OECD, 2008:6-7).

- Redefining responsibilities of school leadership (accepting that being on their own does not spontaneously result into improvement, but needed support from authorities).
- Distribution of leadership and delegation of duties equitably within and between the schools.

- Critical value of providing initial training towards leaders, and continued capacity building.
- Promoting the status of leadership, and making it an attractive profession

School principals are often called managers by department officials, and they also feel proud to be called managers. Some researchers have alluded to the fact that most principals prefer to spend most of their time doing administrative and managerial tasks and relegating instructional leadership to others in their management teams (Marishane *et al.*, 2011; Taole, 2013). This was also emphasised by the findings of a study by the South African Department of Education (DoE, 2003), who realised that the roles and responsibilities of school management teams in mediating and implementing curriculum issues lacked clarity. This is also evidenced by the findings of this study, which found that there was no uniformity with regard to the implementation of policies in schools, and the fact that the term instructional leadership is still not popular among principals adds to lack of clarity of roles, understanding and interpretation of policies.

According to Louis *et al.* (2010), there are two types of actions that principals have to engage with in order to improve teaching and learning. The first is the instructional climate, which is based on the creation of a culture of professional growth and development and learner learning. The second is instructional action, which is mainly concerned about the actions taken in order to achieve the set goals. This is supported by the findings of other studies (Lee *et al.*, 2012; Spillane *et al.*, 2001; 2004), where the focus was on the role of the school principal in improving teaching and learning.

These scholars acknowledge that organisational leadership, particularly in big and complex organisations like schools, is not dependent and also not performed by a single individual. Rather, such leadership functions are distributed amongst other members of the organisation (Lee *et al.*, 2012; Spillane *et al.*, 2001; 2004). On the other hand, Spillane *et al.* (2004) highlight two vital aspects of school leadership which are; that the school leaders are mainly responsible for the quality of teaching taking place in their schools, and that leadership is not only vested on formal leaders, but instead, on activities of both formal and informal leaders (Lee *et al.*, 2012), as well as

the interactions between leaders, followers, and the environments in which they perform their leadership tasks and functions (Stoll & Fink, 1996).

Although it has been prominent over a sustained period of time, some scholars have criticised instructional leadership on two grounds. The first one is that there is a perception that it is focused more on teaching than learning (Bush, 2013). Secondly, according to Hallinger (2003) instructional leadership is centred around the principal as the centre of expertise, power and authority. As a result of all the criticism, it tends to ignore and underplay the role of other leaders such as deputy principals, middle managers, leadership teams, and classroom teachers (Katewa & Heystek, 2019). Hence Lambert (2002) warned that the days of lone instructional leader are over, and that we do not believe that one administrator can serve as the instructional leader for the whole school without substantial participation of other educators. Consequently, Hallinger and Heck (2010) realised that in the 21st century, instructional leadership has been ‘reincarnated’ as ‘leadership for learning’. According to Katewa and Heystek (2019), a number of other scholars took it further to explore the transition from instructional leadership, concerned with ensuring teaching quality, to leadership for learning, which incorporates a wider spectrum of leadership actions to support learning and learning outcomes.

Furthermore, the United States of America has recently placed the role played by a school principal under spotlight based on its evolvement and expanded nature (NCPEA, 2016). Most importantly, the recent change is based on the particular focus on instructional leadership skills of school principals in the discourse of school improvement which is driven by intense demand for accountability (Hallinger, 2011; Hallinger & Heck, 2010; Hallinger & Murphy, 2012). Accordingly, Hallinger and Murphy (2012:7) further state that “today we view instructional leadership as an influence process through which leaders identify direction for the school, motivate staff and coordinate school and classroom-based strategies aimed at improvements in teaching and learning”. The demand for accountability places school principals in such a critical position that they often find themselves only pre-occupied with Grade 12 classes, as shown by the participants in this study, and this also put their instructional leadership skills and strategies under constant scrutiny.

Hallinger (2003) describes instructional leaders as strong directive leaders who can successfully turn their schools around. The fact that such effective leaders are able to align their strategies and activities with the school's academic mission enables them to combine their leadership with creating a positive climate conducive for teaching and learning while also managing instructional practices in their schools. School climate change provides an evidence-based school improvement strategy that creates safer and more supportive schools for the benefit of all its stakeholders (Cohen *et al.*, 2009; Thapa, Cohen, Guffey & Higgins-D'Alessandro, 2013). In recent times, school climate is focused on the importance of the atmosphere, culture, resources, and social networks of a school (Loukas & Murphy, 2007), that essentially possess five critical dimensions: safety, relationships, teaching and learning, instructional environment, and the school improvement process (Thapa *et al.*, 2013).

Despite a lot of interest shown by scholars of instructional leadership (IL) internationally, a study conducted in Malaysia, which resulted in a report named the Malaysia Education Blueprint (MEB), did not explain in detail how IL is conceptualised within the Malaysian education context. Several scholars (Abdullah & Kassim, 2011; Fook & Sidhu, 2009; Sharma, Forlin, Deppeler & Yang, 2012; Ghavifekr *et al.*, 2015) found that there was limited evidence focusing on the principals' instructional leadership practices, and very little is said about other leadership actors and role players. These researchers suspect that this may be due to the centralised and hierarchical nature of the Malaysian school system which is somewhat similar to the leadership context in South Africa.

6.6 DISTRIBUTED LEADERSHIP

This leadership concept asserts that the focal point of leadership rests on the commitment and capacity of the members of the organisation. The higher the levels, the greater the potential to accomplish the set goals (Leithwood *et al.*, 1999). Studies have shown that delegation of duties is a skill. All participants in this study indicated different ways in which they shared their workload with their colleagues. However, I have also noted that the degree of delegation varies from school to school and as indicated in Chapter 4 of this study, it depends on the principals' management style, personality, school culture, trust and many more; the list is endless.

All participants in this study have a fair understanding of distributed leadership; however, the findings have also exposed some of their shortcomings. According to Oduru (2004:8), principals view leadership distribution as “a means of reducing the pressure of the overwhelming workload on them”. This includes paying particular focus only on those activities which in the discretion of the principals carried more weight and importance, and relegating all others to SMT members.

Many studies have been undertaken in the field of school leadership and most agree with the findings of the National Association of Head-teachers (ISLLC, 2008; NAHT:1999), as well as the National College for School Leadership (NCSL:2001), which state that the leadership of an organisation cannot be vested in one person only. These studies assert that principals and successful leaders also recognise the need and importance of empowering others to also become leaders. This came out prominently among all participants in the current study, where they demonstrated a willingness to share their workload with others.

In Chapter 2 of this study I presented the job description of a school principal, as contemplated in the *Educators Employment Act* (Act 76 of 1998). This job description is very comprehensive and spreads across all areas of a school. All aspects of this job description have to be given the necessary attention. However, the execution of all these activities is left to the principals' discretion, and the education departments expect principals to ensure that all activities are attended to and be given the necessary attention. This therefore calls for proper time management on their part.

It is, however, clear from the principals' narratives that priority is given only to some of the activities at the expense of others. For example, all participants paid more attention to Grade 12 teaching and learning and left the other grades to the deputy principals. It is also worth noting that not all activities can be performed in one single day. Proper planning and meticulous application and exercise of distributed leadership and instructional leadership can go a long way towards assisting school principals to establish a desired and remarkable balance, as demonstrated by all participants in this study.

“South African school principals are faced with numerous and diverse expectations due to the constant increase of their roles from management and control to educational

leadership.” (Mestry & Singh, 2007:478). Very radical changes continue to take place in schools due to the ever-evolving policies of the education departments. These changes are complicated by other techno-socio-economic factors, which include technological and democratic shifts, decentralisation issues of accountability, societal violence, and economic conditions (Mestry, 2007). In the midst of all these is a school principal who has to navigate his way out and steer the ship to the shore. Hence, according to Harris (2003), the role of the principal in present times is based on the need to cope with change and its complexities. Distributed leadership is thus a pragmatic response to changing times (Harris, 2007).

Distributed leadership is receiving attention now of late, and researchers have begun to study teacher leadership and distributed leadership as new fields of investigation in South Africa. Although scholars like Grant (2006), Grant and Singh (2009), Grant (2009), and Gardner, Kajee, Moodley and Somaroo (2010) have already started with some preliminary studies, there is a lot that still needs to be done in order to strengthen this pool of knowledge. This study attempts to make a contribution to this area of knowledge in order to broaden the base.

According to Harris (2003), a distributed leadership perspective does not focus on the position of individuals in a hierarchical organisation, but on leadership as a collective activity. Harris and Muijs (2003:6) agree that the location of leadership authority does not necessarily emanate from the person of the leader but can be dispersed between and among the staff within the school. On the other hand, Gold (2004) depicts a movement from the single, heroic leader to the ultimate distribution of leadership in teams. Hence the educational leadership in South African schools has evolved along similar trends, where principals who were previously regarded as the only leaders in schools are now extending leadership to school management teams (SMTs) and school governing bodies (SGBs), as well as the various committees within the schools such as the School Development Team (SDT) (**Chapter 2**).

Researchers, on the other hand, have also realised that in organisations where collaboration and learning were promoted there was bound to be improved commitment towards the organisation (Hulpia & Devos, 2010; Vescio *et al.*, 2008). Structures such as the professional learning communities are a classical example where leadership constitutes an important resource for teachers’ commitment (OECD,

2009). In that model, leadership is viewed as instructional support shared at all levels. In fact, according to Berjaoui and Karami-Akkary (2019), participative approaches to leadership where teachers have more authority to influence decision-making on issues that matter to them were associated with effective leadership leading to (1) a greater sense of teacher efficacy; (2) an increased level of trust; (3) greater job satisfaction; (4) greater sense of ownership and commitment to the organisation (Angelle, 2010:14; Devos, Tuytens & Hulpia, 2014).

In a hierarchical setting such as the one in South Africa, where the education system is still centralised, studies have shown that school principals still find it difficult to share power with their school leadership teams. Hence Naicker and Mestry (2011) suggest that if distributive forms of leadership are integrated into the complementary vertical leadership structure of schools, and structures such as networks or webs can be introduced, the principals' role can more easily become that of a facilitator, mediator, coach and supporter, thereby encouraging a more collegial school atmosphere. These scholars go further to emphasise that principals need to learn how to share power and decision-making with others in their schools. "Based on the distributive leadership approach, a principal alone cannot be held accountable for the leadership and management of a school. It is recommended that accountability be shared with those role players whose joint endeavours determine the school outcomes." (Mestry & Naicker, 2013:12)

The current study has shown that principals relied almost entirely on the cooperation of the deputy principals to lead instruction in the other grades within their schools, which essentially implies that they were able to share power with them. According to Harris (2010), the emphasis on informal sources of influence suggests that distributed leadership may also thrive if there is a void in the formal leadership of the organisation. However, the meta-analysis of distributed leadership according to Tian, Riisku and Collin (2016:153) add that, "in a distributed leadership setting, formal leaders should also be regarded as important 'gate keepers', who either encourage or discourage others from leading and participating in organisational changes". Hence Bottery (2004) asks how distribution is to be achieved "if those in formal positions do not wish to have their power redistributed in this way?" In response, Harris (2005:167) "argues that

‘distributed and hierarchical forms of leadership are not incompatible’ but it is evident that distribution can work successfully only if formal leaders allow it to take root”.

Spillane (2006a) earlier argued that distributed leadership is primarily anchored in leadership practice. He asserts that instead of traditional roles and structures, a genuine, distributed perspective extends far beyond positions towards multi-interactions throughout the school community and not only the actions of heroes. He believes leadership should be distributed not only by delegating it away, but by purposefully connecting people, materials, and organisational structures together for the attainment of common goals (Peters-Hawkins *et al.*, 2018). This may be what the principals in this study need the most at this time to ensure a healthy balance between leadership, management and instructional leadership in their schools.

6.7 RECOMMENDATIONS

This section discusses the recommendations which are set to improve the manner in which school principals are enabled to lead, manage and drive instructional leadership at their schools effectively, while at the same time being able to achieve a balance in their work. The section seeks to influence policy review and alignment towards greater support for school principals and their roles.

6.7.1 Recommendations on policy

The school principal’s position as instructional leader needs urgent attention, as shown in this study. The concept of Instructional leadership is still unpopular in many South African schools, and principals are not familiar with the term, yet they are supposed to be in the forefront of its implementation. It is therefore important that the principals’ position be clarified and correctly aligned in order to meet the demands of instructional leadership. This study recommends that the position, status, and role of a school principal be reviewed if we are to succeed in entrenching instructional leadership in schools. All policies that inform the work of school principals need to be reviewed in order to position principals strategically as instructional leaders. These policies need to be restructured thoroughly, and be specific with regard to the job descriptions of principals and clarify their role, as well as give clear directives on how instructional leadership may be practised in South African schools. The case of Malaysia is

instructive to the South African situation in the sense that it also follows a traditionally hierarchical structure, which places much emphasis on principals as instructional leaders, much to the neglect of other formal and informal leaders within the schools.

All structures operating within schools need to realign their roles and direct them towards supporting instructional leadership initiatives. Participants in this study highlighted some shortcomings with regard to the functions of some of the structures in their schools. This played itself out at some schools where some activities were performed by certain structures, yet, at other schools the same tasks were done by different structures. The guidelines on the roles and specific tasks performed by members of various structures need to be reviewed and clarified to all stakeholders (RSA, 2016).

Regular training and capacity building on policies, understanding and implementation, and interpretation must be provided to school principals on an ongoing basis. Variations in terms of implementation patterns of policies discussed in this study demonstrate a dire need for capacity building and training for principals. This should not be a once off event, but should be properly structured to unfold on a continuous basis, and district offices need to monitor and support policy implementation efforts of school principals regularly in order to provide the necessary support at all levels within the schools.

The South African school leadership model therefore should be based on the understanding that distributed leadership, which involves decision-making and influential practices performed by personnel at multiple levels instead of one predominant leader at the top, goes hand-in-hand with instructional leadership. The two leadership processes must be practised jointly as a collective, what I can call the “Dist+Inst = Distructional leadership approach” (Elmore, 2000).

6.7.2 Recommendations for further research

Future research will be strengthened from the narratives of school principals on balancing leadership management and instruction in South African schools. The study will also add the narrative case study data to the current and existing knowledge base. The study focused on two provinces in the Republic of South Africa, with four schools from three districts. All selected schools came from disadvantaged communities;

therefore, they were all quintile 1, 'no fee' schools. A comparative study could be undertaken along similar lines but focusing on those schools that are in quintiles 2 and above, which have different backgrounds, and across all residential areas, including affluent suburbs.

Rather than focusing on principals alone, the entire SMT could be involved so as to establish the spread and effect of distributed and instructional leadership practices of the principals. This will therefore have a bearing on the research methodology, where quantitative or mixed methods would be recommended as opposed to qualitative method applied in this study. Massive data were collected from only four participants in this study, therefore, increasing the sample size will definitely affect the data collection methods as well as instruments used. The study could also be extended to all the nine provinces of the Republic of South Africa in order to generate a common approach to instructional leadership by school principals at national level.

6.8 LIMITATIONS OF THE STUDY

The limitations of this study came from the data collection instruments used. The instruments used included documents, observations, and interviews. This resulted in massive data being collected from the initial six participants. Hence the number was reduced to four in the end, also to avoid unnecessary repetition of data. While the focus of this study was on school principals, I also felt that it could have included the deputy principals as well, so that we could check on the relationships between principals and their deputies in relation to their roles and functionality, as well as to check on the magnitude of distributed leadership of the principal. Even though the sample was small, it generated more than enough data to fulfil the purpose of this study.

It was impractical to extend the sample to include other seven provinces of the Republic of South Africa due to their demographic nature and sparsity. Therefore the study does not seek to generalise. However, it presents insights into the work of school principals, policies that guide their work, structures they have at their disposal, and their daily practices. Another limiting factor was the availability of participants due to the nature of their work and the period in which data were collected. This resulted in

more visits being scheduled during school holidays and weekends, after the initial four full days were spent with each participant in their schools.

6.9 CONTRIBUTION TO RESEARCH AND SCHOLARSHIP

As a result of the scope, nature and limitations of this investigation, I acknowledge that the findings of this study may not be applicable to all schools in the Republic of South Africa. However, I am certain that these findings illuminated some of the grey areas which researchers may find interesting to pursue further.

In its findings the study draws the attention of policy makers to the challenges experienced by school principals in the implementation and interpretation of policies that affect their work, as aptly presented in the current study. The findings of the study also seek to empower other school principals in South Africa and other parts of the world, about strategies that may be employed by school principals in order to comply with policy and establish a balance in their demanding and ever evolving roles of managing and leading instruction in their schools. The findings point to the need for realignment of roles, duties and responsibilities of school principals, if their role as instructional leaders is to be taken seriously.

It is hoped that the study will also encourage debates among school principals and district leadership on the support needed by principals in order to fulfil their dual roles and achieve a balance in their work. The current study also draws the attention of school principals and education departments to the model of instructional leadership relevant to South African schools, as explained in this chapter, that according to Katewa and Heystek (2019), instructional leadership in this country cannot succeed if it is practised alone, without distributed leadership. This is due to the complex and diverse nature of the school environment where emphasis is on democratic and participative process which requires involvement of all leaders from different levels.

The position of a school principal needs to be elevated to the pedestal of CEO equivalent in order to maintain the seniority of principals in their schools, and this study has demonstrated that it carries the same, if not more responsibility. It is therefore against that backdrop that the status of the school principal must be reviewed as recommended in paragraph 6.7 of this chapter.

As a response to all these challenges, I detailed the new standard for school principals in South Africa in Chapter 2 of this study. School principals may find the recommended standard very helpful, even though, as far as I know, it has not been implemented in full in terms of the Occupation Specific Dispensation (OSD). I then also develop a diagram that highlights and simplifies these key areas. Empirical evidence provided in Chapter 4 suggests that all participants are fully aware of their responsibilities, as outlined in the relevant policies discussed. Principals are also cognisant of the fact that they need more hands, more sharp brains, ears, eyes, healthy bodies and more feet to cover all bases in the mandatory roles of instructional leadership and management of their schools. Therefore, distributed leadership may be a viable option, and answer to their challenges.

The development of a Delegation Model for Principals (DMP)

This is a proposed model developed from the data in this study and is mainly informed by the following:

1. The findings of the study highlighted an uneven and haphazard sharing and delegation of duties and responsibilities. (**Chapter 5 & 6**)
2. The recommendations of the standard for principalship in South Africa, which emphasises the 8 key performance areas. (**Chapter 2 & 4**)
3. The policies that prescribe the work of the school principals, in particular: The *Employment of Educators Act* (76/1998) where it spells out the job descriptions of all educators in the different post levels; The IQMS – which ensures quality assurance; NEPA, NCS, CAPS – curriculum matters; SASA – governance issues; Access to schools – Learner attendance; LRA – which regulates the relationships in the workplace; The RSA Constitution – the supreme law in the country that enshrines specific rights to education. (**Chapter 4**).

The DMP is my contribution to research and scholarship and is informed by Hallinger's (2012) model of the three sets of leadership dimensions, with particular emphasis on distributed leadership practice by school principals. This model can therefore be adaptable to schools in the Republic of South Africa. The proposed model (DMP) may not be the beginning and the end in itself, but is presented here as a proposal, and

also to challenge researchers to think of innovative ways to improve it, such that it addresses the needs of the broader spectrum of school leadership.

The DMP proposes a formalised responsibility model, which may help to reduce pressure on the shoulders of school principals. The model also ensures that those tasked to perform certain duties can be held accountable for their performance. This model may also help to ensure that school principals do not only delegate those responsibilities they do not like and those that they perceive to be unimportant to them. The key performance areas from the standard for principal in South Africa is presented in the table below:

Table 6. 1: Summary of key performance areas for school principals (DBE, 2014)

No.	KPA	ACTIONS	RESPONSIBILITY
1.	Leading teaching and learning (Managing the instructional programme)	Strategic leadership Executive leadership Instructional leadership Cultural leadership Organisational leadership	Principal
2.	Shaping the direction of the school (Defining the school's mission)	School development School improvement Planning	Principal
3.	Managing the school as an organisation (Promoting a positive learning climate)	financial management institutional management informational management	Principal
4.	Managing quality of learning and teaching and securing accountability (Managing the instructional programme)	Quality assurance Appraisal practice Learner assessment	Principal
5.	Managing human resources	Staff establishment Conditions of service Labour relations matters	Deputy Principal-1
6.	Developing and empowering staff	Staff development	School Development Team (SDT) Deputy Principal-2
7.	Managing and advocating extra mural activities	Managing Advocating	Sports and Culture Committees
8.	Working with and for the community	• Immediate school community	School Governing Body (SGB), Teacher component and SGB sub-committees

		• Broader community and professional learning networks • Partnerships	Deputy Principals HODs
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The table above outlines the key performance areas (KPAs) of school principals. In the first four KPA's I have included Hallinger's model about dimensions, where I show the link and emphasis on critical instructional leadership practices. Here I propose that certain roles and duties be distributed to other structures within the schools, such as the SGB, HODs, deputy principals, and other key committees. As reflected in the table above, principals can be responsible for four out of the eight focus areas, which include, leading teaching and learning, shaping the direction of the school, managing the school as an organisation, and managing the quality of learning and teaching and securing accountability. Distribution of these functions does not in any way suggest that the principals will be absolved of their responsibility. It however seeks to provide the scope and direction as to which activities should be performed directly by the principals over and above the others, which can be delegated to other structures.

This distribution also streamlines the scope of the principals' work, thus providing clear parameters within which they can operate, unlike the current situation where the field is deep and too wide, resulting in other members of the school management team such as the HODs and Deputy Principals not being held to account for their actions or performance.

All participants in the study were unanimous that they were unable to do everything on their own. What came out common among them is the manner in which distribution is done, which mainly rests on the individual school principals. The proposed sharing of responsibilities will improve effectiveness, because there will be more focus on each area of performance, and it will also entrench meaningful room for accountability.

The following diagram therefore highlights the key performance areas enshrined in the standard for school principals in South African schools.

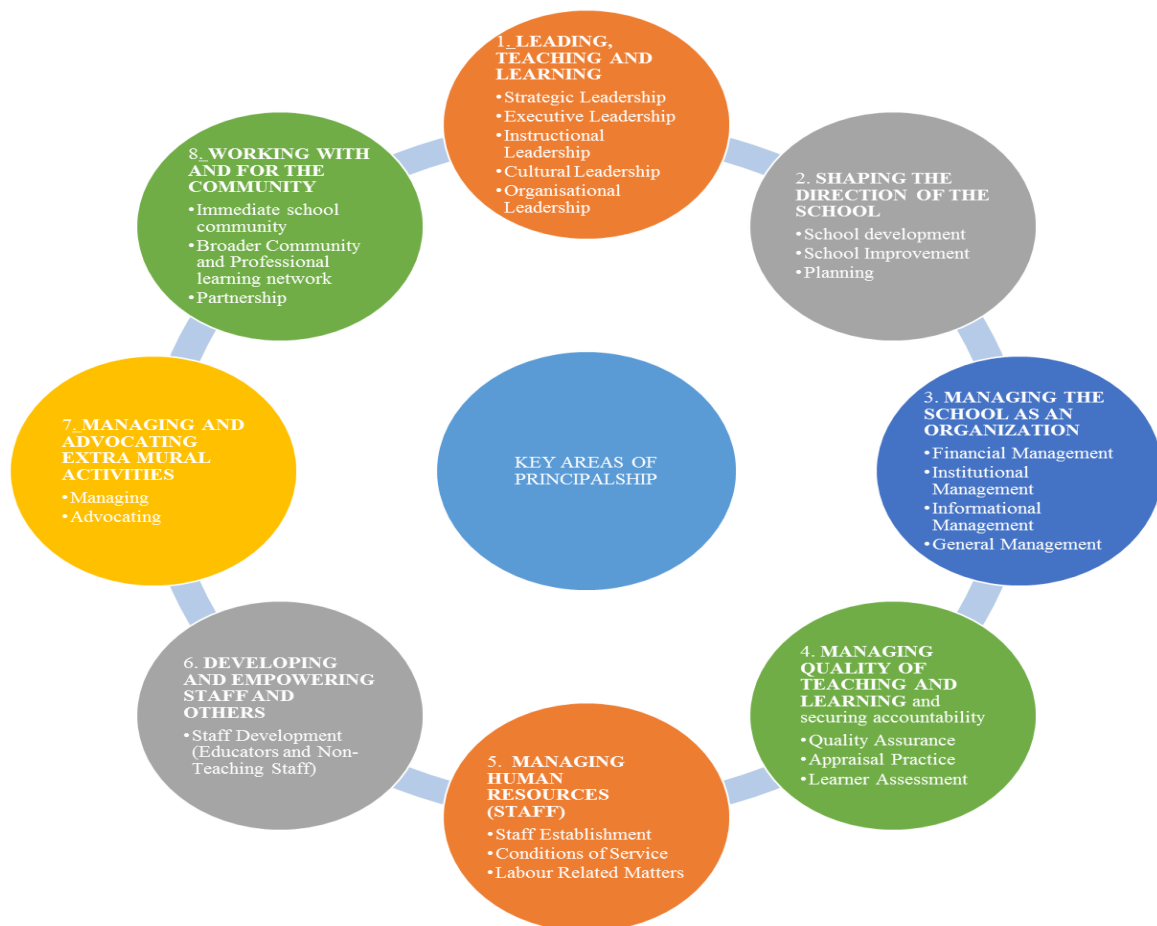


Figure 6.1: A model of the Key Performance Areas for Principals (KPA) (T J Tshabalala)

The introduction of occupation specific dispensation (OSD) in 2008 recommended a performance and management system (PMDS) for all public servants and in this context those working in education. The OSD purports different levels of performance requirements and links them to remuneration. According to the OSD, principals are required to draw up annual performance plans where they set objectives and targets for themselves in line with the core management criteria (DoE, 2003). Figure 6.1 shows at a glance how these critical performance areas are linked.

This study has shown that a balance may, among other things, be achieved by school principals who delegate, share and distribute some of their responsibilities to their colleagues in the SMT and other structures at their disposal. This enables the principals to focus on what is important to them, and that is, the Grade 12 results. The four participants admitted that their focus was on Grade 12 teaching and learning, with an ultimate goal of achieving the best results. The distribution of duties depended on the individual principals, and was not informed by any policy, hence there were

variations in terms of which activities, and how much of their work was delegated to others.

Distributed leadership is understood to be a decision-making and influential practice performed by personnel at multiple levels instead of one predominant leader at the top (Elmore, 2000; Harris, 2009; Hartley, 2007; Lashway, 2006). According to Williams (2011:195), “the majority of South African schools function in contexts which are generally not conducive to distributed leadership. The transformation of the South African education system since 1994 has resulted in what one school principal referred to as ‘policy overload’. In an effort to deal with the transformative initiative, educators have generally become strained and spent, and increasingly unmotivated and frustrated”.

This study supports distributed leadership with decision-making powers as highlighted by Mestry and Naicker (2013), and also agrees with their earlier assertion that where distributive forms of leadership are integrated into complementary vertical leadership structure that is currently followed in schools, structures and networks can be gainfully employed such that the role of the principal can become more of a facilitator, mediator, coach and supporter, thereby encouraging a more collegial school atmosphere (Mestry & Naicker, 2011).

6.10 CONCLUSION

In an attempt to respond to the research questions stated in Chapter 1, the findings of this investigation revealed that the success of instructional leadership in schools rests on the shoulders of school principals. Many scholars have done extensive work on this matter, and there is ample empirical evidence available. All these studies point to the nature of involvement of the principals in instructional leadership, and the innovative and creative execution of their roles. The role played by principals came under scrutiny and confirmed the findings of other instructional leadership scholars that, where principals have made instructional leadership their priority, teachers and learners’ performance has improved.

This study therefore comes to the conclusion that while education departments have played their part in making policies that support instructional leadership, it still remains

the responsibility of school principals to interpret and implement them. The findings of this study revealed some inconsistencies that came out strongly during interviews, where some principals found certain policies difficult to understand and/or implement, while others executed them with ease. The study also concludes that there is a need for a mind-set shift among education departments' district officials and most importantly school principals. They need to espouse and promote instructional leadership rather than 'curriculum delivery', which is a term mostly used by all participants who found instructional leadership as a new and probably strange term, while they were in fact taking part in it.

School principals need to focus all their attention on instructional leadership and delegate many of the other functions to relevant structures within their schools, and not only focus on Grade 12 learners, but the whole school. All cases presented in this study revealed that all participants were hands-on with Grade 12 instructional leadership, and their results over a five-year period attest to the findings of many instructional leadership scholars, as discussed in Chapter 2 of this study.

6.11 FINAL THOUGHTS

School leadership has always been a very challenging and complex phenomenon. For many years, scholars across the globe have tried to highlight and illuminate the difference between leadership and management. In Chapter 2 of this study I interrogated literature on these two concepts in detail and how they relate to teaching and learning in schools. This study has brought to light the purpose of the work that should be done by school principals, and how this relates to teaching and learning. Scholars have found that Instructional leadership can only succeed if it is driven by principals.

I am, however, worried that South African school principals have not as yet come to terms with the idea of instructional leadership as their core business. Many of these principals still believe they are managers, and would rather prefer to be called "curriculum managers" instead. Principals view their positions as the most senior in their schools and being called instructional leaders perhaps does not sound senior enough. Instructional leadership has not therefore been brought to the centre stage of what the work of principals entail.

This study has established that all the participant principals were not familiar with the term instructional leadership, even though their practices were to a large extent associated with instructional leadership. In order for instructional leadership to be fully entrenched in schools, education departments have to lead from the front and review some of the policies that define the work of school principals. This will then place principals in the driving seat of teaching and learning. Finally, more effort is needed to continually provide training for principals so as to level the uneven base in terms of policy implementation and leadership practice in schools.

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APPENDIX 1: OBSERVATION PROTOCOL/SCHEDULE

During this process, the researcher will take notes of every activity the principals engage in. These will then be transcribed as a full text within 24 hours of the event.

TOPIC: Principals' narratives on balancing leadership, management and instruction in South African schools.

Research Question: How do principals go about carrying out their dual mandate as instructional leaders and managers at South African schools?

The following will be observed:

1. The leadership at the school – check the way the principal uses various forms of data to inform learners, educators and other staff, and the broader school community.
2. The roles and ranks of all leaders identified, if any.
3. All activities that directly demand the principal's attention – look at how the principal mediates academic performance and the way he/she ensures instructions are carried out.
4. The manner in which the principal engages with all stakeholders at the school.
5. The staff relationships with the principal as he engage with them – the way decisions are arrived at with regard to duty allocation, election into committees, etc.
6. The activities that take up more of the principals' time during the day – principals' annual calendar showing key dates of important activities.
7. The challenges/highlights that the principal encounters and the way he/she handles them.
8. The reaction of all stakeholders to the presence of the researcher.
9. The general atmosphere in the school – look out for latest classroom data that are placed on notice boards for staff and other visitors to see.
10. The use and management of physical and human resources – the deployment of senior teachers, HODs, deputy principals and other leaders to improve instructional practice.

APPENDIX 2: OBSERVATION NOTES GUIDE/TOOL

Date: Place:

Time:

- Nature of activity – (workshop, meeting, assembly, etc.)

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.....

- Participant (principal, or any other person)

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.....

- Purpose of activity

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.....

- Leadership roles (who was leading, why, how. Report on the role of the principal)

.....
.....
.....

- Major activities planned, discussed and actioned by the principal. Are there any development workshops planned, awards functions, or any other planned activity, etc.

.....
.....
.....

- Interesting issues noted during the visit

.....
.....
.....

APPENDIX 3: INTERVIEW QUESTIONS PROTOCOL

DAY 1

1. Ice-breaking discussions: Where the researcher introduces himself, asks about background information regarding experience in teaching, as a principal, how long has he/she been at the school (as a teacher and / as a principal). Vision, Mission of the school
 - Probe the role of the principal at the school. Ice breaking and establishment of camaraderie.
2. What does your role as a manager, leader of a school, and instructional leader entail?
 - Explain your role as a manager and instructional leader.
 - How do you balance leadership, management and instructional leadership?
 - What values do you live for as a person?
 - How do you utilise/deploy the HODs and DPs at your school?

DAY 2

3. What characteristics of your school have an impact on your leadership, management and instructional leadership?
 - What systems do you have at your school that enable you to achieve your goals?
 - What challenges do you face as a leader, manager and instructional leader?
 - How do you overcome these challenges?
 - How does the department of education contribute or assist in these challenges?
 - How do you plan your work?

APPENDIX 4: ANALYTICAL FRAMEWORK

RESEARCH QUESTION	THEMES	RESEARCH QUESTION TEXT	QUESTION REFERENCES	DATA COLLECTION TOOL	TYPE OF DATA COLLECTED	DATA ANALYSIS STRATEGY
RQ 1	Policies that guide the work of principals	What are the policies that guide the work of school principals in SA schools and how do principals make sense of these policies?	Policy Documents such as, The PAM document & Employment of Educators Act (EEA)	Semi-structured Interviews Documents Observations	Qualitative	- Analysis of content - Organising into themes - Use coding on themes - Establish trends
RQ 2	Structures and Resources that enable	What structures and resources do principals rely on to carry out these policy guidelines in their dual mandate of management and instructional leadership in schools?	Interview Questions 6, 7, 8 Observation protocols	Semi-structured Interviews, Document observations	Qualitative	- Analysis of content - Organising into themes - Use coding on themes - Establish trends
RQ 3	Day-to-day leadership practices	How do principals go about their day-to-day practice of leadership and management of schools and how is the balance achieved if at all	Interview Questions 2, 3, 4 Observation Protocol	Semi-structured Interviews, Observations Documents	Qualitative	- Analysis of content - Organising into themes - Use coding on themes - Establish trends
RQ 4	Success of some principals	How can we explain the success of some principals with regards to the challenge of balancing management and instructional leadership at their schools	Interview Questions 3, 5, 7, 9,10, Observation Protocols	Semi-structured interviews, Observations Documents	Qualitative	- Analysis of content - Organising into themes - Use coding on themes - Establish trends

APPENDIX 5: DOCUMENT AND POLICY CHECK LIST PROTOCOL

Thanking the participants for availing their documents and policy circulars for the researcher to analyse in a bid to ascertain the availability, usefulness and utility of these policy documents in guiding the principals in their day-to-day leadership and management practices in the school.

DOCUMENT AND POLICY CHECKLIST	AVAILABLE	NOT AVAILABLE	UTILISED TO GUIDE THE PRINCIPAL AND THE SCHOOL'S ACTIVITIES	NOT UTILISED	REMARKS
Code of Conduct (Learners)					
Finance policy					
Admission policy					
Subject/Learning area policies:					
Maintenance policy					
Assessment policy					
Language policy					
Extra-curricular policy					
Environmental policy					
Safety and security policy					

Staff development and induction policy					
Vision and mission statements					
Job descriptions					
Time books (Educators)					
Timetables					
Substitution timetables					
Playground duty roster					
Learner register					
School improvement plans					
Budget					

Adapted from Juta, 2007. *School Leadership and Management, Policy, Leadership and Management for South African Schools*, 1(6):10.

APPENDIX 6: GDE RESEARCH APPROVAL LETTER



GAUTENG PROVINCE

Department of Education
REPUBLIC OF SOUTH AFRICA

8/4/4/1/2

GDE RESEARCH APPROVAL LETTER

Date:	16 March 2017
Validity of Research Approval:	08 February 2017 – 29 September 2017 2017/38
Name of Researcher:	Tshabalala T.J
Address of Researcher:	2 Kransduif Street Falcon Ridge Vereeniging, 1929
Telephone Number:	018 429 2669 082 557 0912
Email address:	mshengutj@gmail.com
Research Topic:	Principals' narratives on balancing leadership, management, and instruction in South Africa schools
Number and type of schools:	Three Secondary Schools
District/s/HO	Gauteng West

Re: Approval in Respect of Request to Conduct Research

This letter serves to indicate that approval is hereby granted to the above-mentioned researcher to proceed with research in respect of the study indicated above. The onus rests with the researcher to negotiate appropriate and relevant time schedules with the school/s and/or offices involved to conduct the research. A separate copy of this letter must be presented to both the School (both Principal and SGB) and the District/Head Office Senior Manager confirming that permission has been granted for the research to be conducted.

Paula 17/03/2017

The following conditions apply to GDE research. The researcher may proceed with the above study subject to the conditions listed below being met. Approval may be withdrawn should any of the conditions listed below be flouted: 1

Making education a societal priority

Office of the Director: Education Research and Knowledge Management

7th Floor, 7 Simmonds Street, Johannesburg, 2001

Tel: (011) 365 3486

Email: Faith.Tshabalala@gauteng.gov.za

Website: www.education.gps.gov.za

APPENDIX 7: APPROVAL BY FREE STATE DEPARTMENT OF EDUCATION

Enquiries: KK Motshumi
Ref: Research Permission: Mr. TJ Tshabalala
Tel: 051 461 9267 / 079 553 4943
Email: K.Motshumi@freesd.education.gov.za



Mr. TJ Tshabalala
2 Kraaiendal Street
Falconridge
Verconiging
1929

082 557 0912

Dear Mr. TJ Tshabalala

APPROVAL TO CONDUCT RESEARCH IN THE FREE STATE DEPARTMENT OF EDUCATION

1. This letter serves as an acknowledgement of receipt of your request to conduct research in the Free State Department of Education.

Research Topic: Principals narratives on balancing leadership, management and instruction in South African schools

Schools: Iketsetseng, Cedar, Sekhubusha and Nkgopoleng Secondary schools in Fezile Dabi District

Target Population: Principals of 4 Schools mentioned above

Period of research: From the date of signature of this letter until September 2017. Please note the department does not allow any research to be conducted during the fourth term (quarter) of the academic year.

2. Should you fall behind your schedule by three months to complete your research project in the approved period, you will need to apply for an extension.
3. The approval is subject to the following conditions:
 - 3.1 The collection of data should not interfere with the normal tuition time or teaching process.
 - 3.2 A bound copy of the research document or a CD, should be submitted to the Free State Department of Education, Room 319, 3rd Floor, Old CNA Building, Charlotte Maxeke Street, Bloemfontein.
 - 3.3 You will be expected, on completion of your research study to make a presentation to the relevant stakeholders in the Department.
 - 3.4 The attached ethics documents must be adhered to in the discourse of your study in our department.
4. Please note that costs relating to all the conditions mentioned above are your own responsibility.

Yours sincerely


DR JEM SEKOJANYANE
CHIEF FINANCIAL OFFICER

DATE: 03/05/2017

RESEARCH APPLICATION TO TSHABALALA PERMISSION 24 APRIL 2017 Fezile Dabi District
Strategic Planning, Policy & Research Directorate
Private Bag X23565, Bloemfontein, 9300 - Room 319, Old CNA Building, 3rd Floor, Charlotte Maxeke Street, Bloemfontein
Tel: (051) 461 9263 / 9221 Fax: (086) 5578 576

APPENDIX 8: ETHICAL CLEARANCE CERTIFICATE



Faculty of Education

05-Dec-2016

Dear Mr Thokolosi Tshabalala

Ethics Clearance: Principals' narratives on balancing leadership, management and instruction in South African schools.

Principal Investigator: Mr Thokolosi Tshabalala

Department: School of Education Studies (Bloemfontein Campus)

APPLICATION APPROVED

With reference to your application for ethical clearance with the Faculty of Education, I am pleased to inform you on behalf of the Ethics Board of the faculty that you have been granted ethical clearance for your research.

Your ethical clearance number, to be used in all correspondence is: UFS-HSD2016/1413

This ethical clearance number is valid for research conducted for one year from issuance. Should you require more time to complete this research, please apply for an extension.

We request that any changes that may take place during the course of your research project be submitted to the ethics office to ensure we are kept up to date with your progress and any ethical implications that may arise.

Thank you for submitting this proposal for ethical clearance and we wish you every success with your research.

Yours faithfully

Dr. Juliet Ramohai

APPENDIX 9: LETTER TO PRINCIPALS

2 Kransduif Street
Falcon Ridge
Vereeniging
1929

The Principal
Mosiuwa High School
Sasolburg

INVITATION TO PARTICIPATE IN A RESEARCH STUDY

Dear Sir/Madam

I hereby wish to request permission to conduct research with you in your school. My name is Thokolosi John Tshabalala, and I am presently studying for a PhD degree with the University of the Free State. As part of my doctoral programme, I am required to conduct research on an aspect of interest with a view to making a contribution to our knowledge and understanding of the issue under study. The title of my research project is: Principals' narratives on balancing leadership, management and instruction in South African schools.

The purpose of the study is to understand how principals of schools go about performing their daily duties as they juggle around issues of management, leadership and instructional leadership.

You have been identified as one of the principals whose schools are progressive and high performing in the province. The study has the potential to benefit all principals who would like to manage in such a manner that they are able to cover all areas of their work each and every day, while ensuring optimal performance and success in their schools.

The study will involve 1. Interviews with the principal, at a time that is convenient to them; 2. Observations of the same principal as he/she performs his/her duties, in a way that does not disturb the management of your school. 3. Analysis of documents they use, and systems that enable their success. The interviews are expected to last

no more than 45 minutes per session, whereas the observations will be continuous over a period of two days per principal, while ensuring that teaching and learning is not disturbed.

I undertake to observe confidentiality and protect participants from physical and/or psychological harm. No names of the schools and/ or persons shall be used in any reports of the research. All participants will be asked to participate voluntarily in the study and may withdraw at any time should they so wish.

Upon completion of the study, I undertake to provide the school with a copy of the research report and to share my findings with you.

I have already applied for and received permission from the Free State Department of Education to conduct the study.

If you need any further information and/or have suggestions, please do not hesitate to contact me and/ or my research supervisor Professor Loyiso Jita at jitalc@ufs.ac.za or +27514017522.

Thank you for your kind consideration of my request.

Yours sincerely

Thokolosi John Tshabalala

Cell: 082 557 0912

E-mail: mshengutj@gmail.com

If you agree to participate in the research study entitled:

Principals' narratives on balancing leadership, management and instruction in South African schools,

Please complete the attached consent form:

- I hereby give free and informed consent to participate in the above-mentioned research study.

- I understand what the study is about, and why I have been approached to participate.
- I understand what the potential benefits and risks are.
- I give the researcher permission to make use of the information collected from my participation for research purposes only.

Participant's Signature:

Date:

Researcher's Signature:

Date:

APPENDIX 10: DECLARATION BY LANGUAGE EDITOR

CORRIE GELDENHUYS
POSBUS 28537
DANHOF 9310

☎ 083 2877088
corrieg@mweb.co.za

15 November 2020

TO WHOM IT MAY CONCERN

Herewith I, Cornelia Geldenhuys (ID 521114 0083 088) declare that I am a qualified, accredited language practitioner and that I have edited the following PhD thesis:

PRINCIPALS' NARRATIVES ON BALANCING LEADERSHIP, MANAGEMENT AND INSTRUCTION IN SOUTH AFRICAN SCHOOLS

by

Thokolosi John Tshabalala

All changes were indicated by track changes and comments for the author to verify, clarify aspects that are unclear and finalise. The editor takes no responsibility in the instance of this not being done. The document remains the final responsibility of the author.



.....
C GELDENHUYS
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APPENDIX 11: PLAGIARISM REPORT

Turnitin Originality Report

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