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SYSTEMATIC REVIEWS OF
**RESEARCH
IN BASIC
EDUCATION**
IN SOUTH AFRICA

CHAPTER 5

Research on school leadership in South Africa: A systematic review

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Introduction

This chapter explains the policy background to school leadership in South Africa, beginning with the Task Team report in 1996, the 1998 stated intention to establish a national leadership centre, the establishment of the Matthew Goniwe School of Leadership and Governance (MGSLG) in 2003, and the development of the national Advanced Certificate of Education (School Leadership) programme, piloted from 2007. The purpose of the chapter is to review the literature on school leadership during this period of radical change, to ascertain the ways in which policy and practice are reflected in published research outputs.

The chapter is based on a systematic literature review and builds on the authors' previous research and writing on school leadership in South Africa. This literature research was conducted using electronic database searching, hand searching of key journals, searching of specialist websites, and using general search engines on the internet such as "Google" and "Google scholar". The databases included the University of Nottingham's NUSearch, Swetsnet, Eric, British Educational Index, JStor and *South African Journal of Education* archives, and the South African university dissertation lists. A total of 473 references were considered by reading the abstracts and selecting sources that might contribute to a comprehensive analysis of literature, predominantly that published between 2007 and 2019. Fine-grained selection identified 138 sources, which were considered in greater detail and form the basis of this review. The criteria for inclusion were that the papers focused centrally on leadership or management in the South African schools' context. Filtering took place to identify and use those sources which offer findings from empirical research on the major aspects of school leadership.

The literature search was informed by consideration of the following sub-themes, which provide the structure for this chapter:

- Policy on school leadership
- Leadership styles and models
- Leadership roles, including principals, deputy principals, and heads of departments.
- School management teams
- Curriculum management and instructional leadership

- Management of finance and resources
- School governance
- Leadership and management of people
- Leadership and diversity, to include gender, race and ethnicity
- Leadership culture and structures
- Leadership and student outcomes
- Leadership preparation and development

In addressing these themes, we take account of contextual variables, such as rural/urban differences, gender, socio-economic factors, and school type: ex Model C, township, rural and farm schools. Where appropriate, we also examine relationships between school leaders and key stakeholders, including district and provincial officials, and teacher unions.

Policy on school leadership

The newly democratic government gave high priority to school leadership by setting up a task team as early as 1996. The mandates set out by the Minister of Education included:

1. To make practical strategic proposals for improving education management capacity in South Africa.
2. To make specific proposals for establishing a national institute for education management development in South Africa.

The task team report (Department of Education 1996) proposed the establishment of an Education Management Development Institute to lead and coordinate management development initiatives:

‘The institute would operate as a node in a national network of institutions with strong linkages to the provincial education management development initiatives, and would provide a locus for intellectual leadership and new ideas and policies, for research and development in the arena’ (ibid: 57).

However, despite this clear recommendation, and a ministerial mandate, the Institute has never been established, although provincial units, notably Gauteng’s Matthew Goniwe School of Leadership and Governance, have been set up.

The next major national initiative was the development of the national ACE: School Leadership programme, piloted in five provinces from 2007 to 2009. The evaluation of the programme (Bush, Kiggundu & Moorosi, 2011) concluded that:

The national programme [should] become an entry-level qualification for new principals as soon as there are sufficient qualified candidates . . . to meet the demand for new principals (ibid: 41).

Although both the pilot programme, and the evaluation, were instigated by the National Department, this recommendation has never been implemented. In 2011, the Council of Education Ministers stated that all new principals should complete the ACE within three years of appointment but this stipulation has also not been implemented. Such policy discontinuities bedevil school leadership development in South Africa, more than 20 years after the Task Team report.

Leadership styles and models

There are numerous leadership models (Bush & Glover, 2014). This section briefly reviews the literature on the major models applied to education in South Africa.

Transformational leadership

Transformational leaders succeed in gaining the commitment of educators through building school vision, establishing school goals, modelling best practices, and demonstrating high performance expectations (Bush, 2011; Leithwood, 1994; Steyn, 2013). In South Africa, there is extensive use of transformational language in the post-apartheid policy discourse but only limited evidence of its impact in schools (Bush & Glover, 2016).

Singh and Lokotsch (2005, p. 286), drawing on interviews with educators in two urban primary schools, discuss the understanding and reality of transformational leadership in South Africa, and comment that ‘the transformational approach must respond to needs amongst followers and must look for motives, extrinsic and intrinsic, to satisfy those needs by enhancing opportunities, empowering people, giving more freedom, performance evaluation and the full support of the leader’.

Distributed leadership

Distributed leadership is increasingly popular in Western literature but evidence of its efficacy is mixed (Bush & Glover, 2014). Consideration of this model in South Africa needs to take account of the deeply embedded managerial culture. Grant (2017) comments that distributed leadership is gaining prominence, due to its normative and representational appeal. However, she expresses concern that the concept has become a catch-all phrase to describe any form of devolved or shared leadership and is being espoused as ‘the answer’ to the country’s educational leadership woes. She argues for a theoretically robust form of distributed leadership conceptualised as socio-cultural practice and framed as a product of the joint interactions of school leaders, followers and aspects of their situation (p. 457).

Hoadley et al. (2009, p. 377) are cautious about the applicability of distributed leadership in a culture where hierarchical structures have predominated, a point

also made by Singh and Lokotsch (2005). Naicker and Mestry (2011), drawing on interviews and observation in three Soweto primary schools, and subsequently with 100 teachers from a range of schools (2014), make a similar point about how autocracy inhibits distributed leadership:

This study indicates that leadership in the three Soweto primary schools is rooted in classical leadership practices and that a shift from autocratic styles of leadership, hierarchical structures and non-participative decision-making is needed if distributive leadership is to develop (Naicker & Mestry, 2011, pp. 12-13).

Williams (2011) and Mafora (2013) also argue that distributed leadership is difficult to implement in traditional hierarchical contexts and point to the dysfunctional and unintended consequences of the transformational agenda:

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 transformational initiative, educators have generally become strained and spent, and increasingly unmotivated and frustrated (Williams, 2011, p. 190).

In contrast to the arguments summarised above, Botha and Triegaardt (2015) claim that shared or distributed leadership is vital in a system of school-based management, to enable classroom teachers to play an important role in improving teaching and learning. Their qualitative study in KwaZulu-Natal province suggests that distributed leadership contributes to improved teaching and learning in effective schools. This leaves open the question of whether it would be a helpful approach in less effective contexts.

Teacher leadership

Teacher leadership is one manifestation of distributed leadership (Bush, 2011) but it is also growing in significance as a model in its own right. Grant (2006, p. 511) reports on a study in five KZN schools and notes that “few teachers appear to be embracing a teacher leadership role”. She also echoes the negative impact of bureaucratic structures:

The main barriers to teacher leadership that emerged in this initiative included hierarchical school organization controlled by autocratic principals, an understanding of leadership as linked to a formal position, as well as teachers who are initially resistant to change because of their lack of understanding of the complexity of the change process. These barriers are real and must be taken seriously in the quest for teacher leadership (Grant, 2006, p. 529).

Grant et al.'s (2010, p. 416) subsequent survey of 81 schools in KwaZulu-Natal led her to confirm her earlier view of the restricted nature of teacher leadership in many KwaZulu-Natal schools. Grant (2006, p. 529) adds that "developing a culture of teacher leadership must be seen as an evolutionary process, underpinned by a new understanding of leadership [...]. Principals need to be supported as they learn to delegate authority and teachers need to be supported as they take up their leadership role."

The discussion of transformational, distributed and teacher leadership shows that the introduction of these approaches to leadership is inhibited by entrenched managerial leadership. Academic discourse is changing but there is little evidence that these emerging models are widely practised in South African schools.

Leadership roles in South African basic education

The formal leadership roles prescribed for South African schools are those of principal, deputy principal, and head of department. These leaders collectively comprise the school management team.

The role of the school principal

The changing context for leadership (see above) has been accompanied by changes in the roles of school principals. This is manifested partly through professionalising the principalship (Van der Westhuizen & Van Vuuren, 2007) and partly by an emphasis on developing a shared vision (Ngcobo & Tikly, 2010). The principal's role also includes ensuring the best possible resource achievement, allocation and evaluation, and the security of the site and property. Xaba (2012) adds that such processes are required to ensure that teaching and learning are of high quality, whatever the context. This links to the growing attention to instructional leadership, and the effective use of all educators through distributed leadership (Bush & Glover, 2016).

Naidoo (2019) argues that the poor educational outcomes in public schools are partly attributable to the poor leadership displayed by many principals. The author explored the perceptions of teachers and school management team (SMT) members of the leadership qualities exhibited by principals who acquired the Advanced Certificate in Education: School Leadership and Management (ACESLM). The findings show that leadership development for principals is crucial for school improvement because it enhances teaching and learning. Where there is high leadership capacity, instructional leadership develops into sound leadership practices (Naidoo, 2019).

Mestry (2017) claims that school principals are faced with more new demands, complex decisions and additional responsibilities than ever before. Their day is usually filled with diverse administrative and management functions such as procuring resources, managing learner discipline, resolving conflicts with parents

and dealing with unexpected teacher and learner crises. Drawing on open-ended questionnaires and personal interviews with eight school principals, the author shows that many school principals repudiated claims that their primary function was to manage teaching and learning. He concludes that those school principals who place a high priority on curricular matters undoubtedly influence teacher and learner performance positively.

Mohale (2014) examined the role of the principal as an instructional leader in the Motupa Circuit primary schools of Limpopo Province. The findings revealed that principals are beset with a number of contextual factors such as inadequate provision of teaching and learning resources and infrastructure needs, lack of monitoring and support of curriculum implementation, inadequate support from the Department of Basic Education, and lack of parental involvement in the education of their children. The author recommended that principals should conduct regular class visits and also ensure that strategies are developed to involve parents of learners in the education of their children.

Deputy Principals and Heads of Departments (HoDs)

There are few major studies of the role of deputy principals in South Africa, a clear research gap. One exception is Bipath's (2015) survey (n=228) of deputy principals and departmental heads, focused on instructional leadership (see below). Research on HoDs is also limited but Ali and Botha's (2006) important research with 100 secondary school HoDs in Gauteng provides some valuable insights. They stress the need for HoDs to focus their time on managing teaching and learning. This should include systematic analysis of results, planning for improvement, and monitoring classroom practice, using observation and target setting.

School management teams

Bush et al. (2010) found several examples of dysfunctional school management teams (SMT) in their small-scale study in Limpopo and Mpumalanga. However, Bush and Glover's (2013) survey of 180 Mpumalanga SMT members showed that the framework for greater team effectiveness was in place in many schools with almost a third meeting weekly and the great majority (88 per cent) meeting at least monthly. There was also an enhanced focus on instructional leadership, with more than half of respondents including curriculum management, and monitoring teaching and learning, among their top two priorities. However, Hoadley et al.'s (2009) research in the Eastern and Western Capes found that the priority role of the principal is that of school administration, thus minimising the leadership function of SMTs.

Phalane's (2016) mixed methods study, with a survey and six case studies, focused on the leadership strategies employed by secondary school management teams (SMT) in managing teamwork in Tshwane North District schools. The

participants' perceptions of leadership strategies are generally favourable. The author recommends that strategies and systems need to be in place, implemented, monitored and reviewed on a regular basis to check if they are yielding required outcomes. SMT should also be aware of the importance of communicating those strategies to all staff members, and to seek comments and opinions before implementation, to avoid staff resistance.

Curriculum management and instructional leadership

Bush and Heystek (2006) note the low priority given to this activity by Gauteng principals but there has been some change in attitudes since then, partly prompted by the inclusion of Managing Teaching and Learning (MTL) as a core module in the national ACE: School Leadership programme. In this section, we review the research on different aspects of MTL.

Curriculum management

Most of the research on this theme relates to the macro level of curriculum management, rather than to classroom practice. Hoadley et al. (2009) show how curriculum management in 200 schools was affected by the social context of the school, the nature of school culture, so that it is “learning centred”, relationships between schools and homes, good use of resources, and the extent of leadership dispersal within the school. The findings point to the importance of parental support and engagement as well as the instructional focus of the school in achieving student gains over time. They add that the school curriculum should be fully covered, with a well worked out plan to improve student results, and making the fullest use of the day for maximum learning. This requires a stress on learning, a positive culture, positive home-school relationships, good resource management, and effective distributed leadership as well as an instructional focus (Bush & Glover, 2016).

Lumadi (2012) argues that the SMT is responsible for planning, and directing the work of a group of teachers and students, monitoring their work, and taking corrective action where necessary. They have the authority to change the work assignments of team members. The leadership of secondary schools in Mpumalanga involves the evolution of a shared vision through effective strategies that allow that vision to be realised. This involves putting all available resources to work in the most effective way to ensure that the best standard of education for all students is provided. Lumadi (2012, p. 121) adds that this is a topic “driving the school management team frantic” in Mpumalanga.

Instructional leadership

There is increasing recognition that instructional leadership may be an appropriate approach to school improvement in South Africa. However, Bush (2013) adds

that little attention has been given to the processes by which improvement can be achieved, including the need for modelling, monitoring and professional dialogue. These may be manifested through high-quality observation of classrooms, discussion of practice within learning areas or phases, and the achievement of consistency in expectations of behaviour and practice for both learners and educators.

Middle managers are also responsible for instructional leadership and Ali and Botha (2006), in the first major study of HoDs in South Africa, focused on 100 secondary school HoDs in Gauteng. They note that, if teaching and learning are to improve significantly, “HoDs will have to spend much more time in supervising the teaching and learning activities that occur daily in their subject or learning area” (p. 17). Significantly, 79 per cent of their respondents refer to “monitoring the teaching and learning standards of educators and learners” as one of their major contributions to school improvement (p. 80), but the authors question whether the HoDs are really carrying out this task. They also suggest that middle managers should develop a routine of analysis of results, planning for improvement, monitoring classroom practice, using observation and target setting.

These points are similar to the recommendations made by Bush et al. (2010) in their study of MTL in the Limpopo and Mpumalanga provinces. Their suggestions are that HoDs should:

- hold regular meetings of the educator team to plan teaching and to discuss problems;
- model good practice by taking lessons while educators observe;
- observe educators regularly and provide structured and constructive feedback to enhance teaching and learning;
- evaluate learner outcomes and design strategies to improve classroom practice; and
- monitor the work of educators through scrutiny of work plans and learner outcomes.

Hoadley et al.’s (2009, p. 385) research showed that curriculum management is more effectively managed where it is seen as a whole school responsibility and where instructional leadership is used. However, they note that the great disparity of leadership style, resourcing and management, and the delegation of curriculum matters to subject leaders, is hampering improvement.

Naidoo and Petersen (2015) argue that robust training and development in instructional leadership practices are necessary to support school leaders. Their study of five principals, who have completed the ACESLM programme, indicate that some principals are not fully conversant with their roles and responsibilities as instructional leaders. They mainly interpret their functions to be purely managerial and to be leaders and administrators of schools.

Bipath's (2015) survey (n=228) of deputy principals and departmental heads showed that instructional leadership was composed of four sub-dimensions, which could be used to identify areas for possible improvement. The findings show that the sub-dimension of "Monitoring and providing feedback on the teaching and learning process" was the best predictor of instructional leadership. The self-confidence of the principal, knowledge of current developments in the curriculum regarding instructional leadership, attending and participating in curriculum-related workshops, and communicating curriculum goals to teachers, were considered crucial to ensure that principals become instructional leaders.

Management of finance and resources

Physical and financial resources provide much of the support required to implement the management of teaching and learning in South Africa (Bush & Heystek, 2006). Their survey of Gauteng principals showed that they regarded financial management as their main development need. Mestry and Hlongwane (2009, p. 341) add that principals feel that financial management is more complex when involving SGB members, as required by the legal framework.

Hoadley et al. (2009, p. 374) stress the importance of the resource base for educational improvement, and the significance of the local context. Their evidence demonstrates the continuing disparity in resources available to schools in different contexts:

New funding arrangements allowed for fees to be levied, introducing a quasi-market into schooling, and at the same time provision was made for a measure of funding redistribution in favour of poor schools [...] The new policies, designed to change the system from top to bottom, [...] did not speak to the conditions of the majority of schools, or adequately address the deep historical inequalities and uneven quality that existed within and across the country's schools.

There is limited research about the way in which individual schools make use of financial planning, resource management, and the monitoring and evaluation of funds. However, Mestry (2004, p. 127), following focus group interviews and observations with SGB members and educators in four schools south of Johannesburg, concludes that there were four main problems at that time. First, in some schools, the principal and the school governing bodies did not work collaboratively with each other in managing the school's finances. Second, the SGBs were not trained effectively to manage the school's finances. Third, some of the principals objected to the cascading model of training and found the content of the workshops to be too theoretical. Fourth, the Department of Education had no mechanisms in place to support schools on financial issues and problems.

These findings are similar to those of Mestry and Hlongwane (2009, p. 333), who investigated the perceptions of 20 secondary school governors in Gauteng and noted that problems arose from the lack of financial resources, the imperfections of cascading training, variations in the frequency and attendance at training sessions, the quality of training on offer, and a general apathy amongst SGB members. Lekalakala (2009) found similar problems with either lack of training opportunities, or lack of quality provision, in the Ramotse area of Tshwane, Gauteng. Thenga's (2012) study of practice in Gauteng township schools shows a lack of SGB training, inconsistent training, lack of accounting skills, and differing practice by local district education officials (Bush & Glover, 2016).

Basson and Mestry (2019) report that many SGB members lack the necessary knowledge and financial skills to manage school finance effectively. This has resulted in more financial responsibilities being assigned to principals, who in turn solicit the assistance of other members of school management teams (SMTs). However, their findings revealed that collaboration between members of the SGBs and SMTs on school finances is very limited. Dibete's (2015) study of the role of SGBs in managing finances in no-fee schools in Limpopo produced some similar findings. The author shows that many of their participants lacked the knowledge and skills required to manage their school funds effectively, mainly due to low literacy levels and lack of training.

School governance

The introduction of school governing bodies from 1997 was widely regarded as an important aspect of grassroots democracy in the new South Africa. However, Xaba's (2011, p. 210) research shows the problems inherent in establishing effective governance:

It is clear from the participants' responses that there are difficulties in understanding governance, mainly because governors perceive their roles differently, which detracts from their main responsibility – promoting the best interests of the school. This, combined with less than adequate capacity-building, as required by the Schools Act, adds to the ineffective execution of functions.

Mestry and Khumalo (2012) examine governor involvement in relation to learner discipline, regarded as one of the most contentious issues, and stress the importance of developing a code of conduct for learners. They add that, despite the problems of illiteracy and lack of confidence, and the associated lack of knowledge of legislation, some schools are moving forward to develop, monitor and evaluate policies.

Mncube (2009, p. 102) conducted research with governors in four schools, leading to a survey of 430 parents in ten different schools, supplemented by

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observation of two SGB meetings. He concludes that, with the complexity of the legal framework, and the nature of the relationship between stakeholders, it is not surprising that the democratic voice of parents is barely heard in some schools:

While representation and debate are theoretically open and fair, structural and behavioural factors still inhibit the extent to which SGBs operate; the authoritarianism of school leadership and governance, characteristic of the apartheid era, have disappeared, yet issues concerning values, behaviour, attitudes and skills necessary for full democratic participation remain.

Mbokodi and Singh (2011) report on parental partnerships in the governance of ten schools in townships close to Port Elizabeth where, although legal requirements are being met, parental involvement is ineffective because of problems arising from the poor education of those involved. Brown and Duku (2008), drawing on interviews with 48 parents in rural parts of the Eastern Cape, note the poor conceptions of governance and management in all component groups and report extensive use of micro-political groupings within the SGBs, the silencing of minority (usually female or younger male) members, and the gender related conflicts and tensions, where “traditional” views of women are upheld by dominant males.

Clase et al. (2007, p. 253) examined tensions between the SGB, and district or provincial authorities, based on surveys and interviews with 63 officials and 40 SGB groups in Afrikaans Free State schools. They argue that these tensions arise from different interpretations of the concepts of management and control, uncertainty regarding the purpose and responsibilities of the SGB, mutual mistrust and weak relationships.

Mabovula (2009, p. 219) notes that learner participation in school governance is guaranteed in the National Department of Education’s guidelines for Representative Councils of Learners, as part of democratic governance. He concludes that the “potential, limitations, constraints, consequences, and challenges facing learners in the school governance structure need to be revealed and debated”. Mathebula (2005, p. 190) comments that the role of the representative councils is hampered by the minimal democracy evident in many schools. As noted above, Mncube (2008) also concluded that there is very limited involvement of learners in school governance, despite the national framework for their involvement.

To secure changes to increase learner participation will require modification of both principal and educator attitudes, especially in those areas where the culture is still “elder” dominated, and where challenge in debate is seen as disrespectful.

Smit and Oosthuizen (2011, p. 64), drawing on a survey of 456 principals, SGB chairs and district officials, and on workshop discussions, also stress the

importance of all stakeholders understanding the difference between participative democracy and political democracy and show that these concepts are frequently confused. They point out that the development of democratic principles in action may be inhibited by the political activity of educators, notably through teacher union activity.

Levy and Shumane (2017) explore governance dynamics in four case study schools in low-income communities in the Eastern Cape. The case studies uncovered both vicious circles of capture and virtuous spirals – with the latter characterised by shared developmental commitment among school leaders, teachers, parents and the community. The findings offer encouragement that non-hierarchical entry points for improving educational outcomes may lead to gains.

Levy, Cameron and Hoadley (2016) synthesise the findings of research on the politics and governance in South Africa, undertaken at multiple levels, and using multiple methods. While policy-making, the regulatory framework, and resourcing, are uniform nationally, responsibility for implementation is delegated to the country's nine provinces, which differ substantially from one another, both politically and institutionally. School-level case studies detail how, in the Western Cape, a combination of strong bureaucracy and weak horizontal governance can result in unstable patterns of internal governance, and sometimes a low-level equilibrium of mediocrity. In the Eastern Cape, pro-active engagement by communities and parents can support school-level performance even where the broader governance environment is dysfunctional.

Leadership and management of people

Leading and managing people are central aspects of school leadership in all contexts (Bush & Middlewood, 2013). Two aspects, in particular, are reported in the South African literature (Bush & Glover, 2016).

Staff development and mentoring

The emerging research on staff development is concerned with teacher perceptions of the context within which they work and leadership plays a large part in determining this context. Bantwini (2012, p. 517) explains how this affects teacher quality through professional development in primary schools in the Eastern Cape:

Teachers had negative perceptions that led to the belief that they were not receiving the support and tools they needed for professional development from their district. The impact of their perceptions was evident in the slow or non-implementation of the district's newly launched curriculum reforms [...] Failure to address teachers' perceptions is likely to result in teachers not benefiting from their professional development programs.

Luneta's (2012, p. 377) literature review on teacher attitudes to further training also concludes that educator involvement in planning activities assists a more positive attitude. Moorosi (2012, p. 501) draws upon the data sets from two investigations to consider the impact of mentoring as a means of leadership development. She differentiates between the groups of people providing the mentoring and the context within which the process takes place. She links mentoring to several aspects of diversity within South Africa:

Although the majority of mentors were male and protégés were female, gender alone does not appear to have jeopardized these mentoring relationships. Instead, more protégés benefited from cross-gendered relationships. However, the racial composition of mentors seems to have had some influence on mentoring. Same-race relationships appear to have worked better than cross-race ones and more disadvantage was experienced where there were two or more levels of diversity.

Mestry et al. (2009, p. 480) stress the links between effective professional development and teacher motivation: "For professional development to be effective, motivation should be intrinsic rather than extrinsic."

Performance management

The under-performance of South African schools (see above) has led to attempts to manage the performance of educators. The most prominent, and enduring, model is the Integrated Quality Management system (IQMS). De Clercq (2008, p. 9) comments on the IQMS approach and its impact on teacher development:

IQMS makes problematic assumptions about educator quality and improvement in South African schools. It is not aligned with the status and work of most educators, and over-estimates the implementation readiness of the majority of schools as well as the appraisal and support capacity of senior school and district management. The challenge is to make educators behave and be treated as professionals, as well as to manage the inevitable tensions of appraisal systems.

De Clercq (2008) concludes that a systemic approach to teacher monitoring and development is not sufficient because it also requires changes in the beliefs and attitudes of educators and appraisers. For appraisal to be effective it is necessary to develop support systems to foster development.

Queen-Mary and Mtapuri (2014) conducted open-ended interviews with various stakeholders and conclude that the IQMS was implemented too readily. They posit an alternative, bottom-up model, focused on educator development informed by participation and empowerment. Mosoge and Pilane (2014), drawing on interviews with 15 participants, also claim that development has been neglected within IQMS, in favour of appraisal linked to incentives.

Leadership and diversity

South Africa offers a distinctive example of the importance of inter-sectionality in understanding school leadership and diversity. The statutory separation of learners, educators and leaders under the apartheid regime provides clear evidence of a racist approach to society, including education. Meanwhile, patriarchy was, and arguably continues to be, a pervasive element of South African education. Social class is a significant predictor of educational opportunity and life chances, and is still largely stratified by race, despite the emergence of a black middle class. This section draws on research on various aspects of diversity.

Heystek (2009) discusses teacher appointments in ethnically diverse schools. The government's policy of centralising decisions about appointments can, therefore, be understood as a part of the policy of redress and equal opportunity in reaction to apartheid. In the current context, the opposite of forced separation is applied in the appointment of teachers at schools. The provincial departments of education, who are the official employers of teachers, want to appoint black teachers in formerly white schools. Although it may be politically correct to do so as part of emphasising equal opportunity in the work place, it ignores a sociological approach to diversity and the identity preference indicated by the teachers in the research project. Social identity theory explains that individuals – and therefore also groups – will identify with other individuals and groups in accordance with their preferences. This may provide an option during the appointment of teachers. Thus governing body members could appoint teachers according to the local community's needs and criteria, as long as the governing body does not discriminate unfairly against any individual (p. 21).

Bush and Moloi (2007) offer a different perspective on the deployment of teachers and leaders in post-apartheid South Africa. Their study of 'cross-boundary' leadership in Gauteng showed that educators overwhelmingly (more than 90%) continue to practise in schools previously reserved for their own racial groups. The researchers interviewed 46 school leaders who crossed these racial boundaries and found some disturbing evidence:

The experience of these 'cross-boundary' leaders differs significantly along racial lines. White, Indian and 'Coloured' leaders are generally welcomed in the former Black schools but [black leaders] often face discrimination and even hostility in the previously white schools (p. 45).

This evidence links to the ingrained belief that white people were 'superior' to those of other groups, a direct consequence of the apartheid philosophy. One of the black participants in this study comments that 'black educators believe that white is good and clever' (ibid, p. 47). Despite the legislation promoting equal opportunities for all racial groups, it will take some time for such attitudes to change.

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Sayed (2016) also examines the unintended class differentiated and inequality reproducing effects of post-apartheid educational legislation. He argues that such policies have had the unintended consequence of creating an unequal two-tier education structure in South Africa. While formally de-racialising schooling, and aiming to make it more equitable, the policies have not fundamentally eradicated the class and race bifurcation of the education system. A relatively well-functioning, well-resourced semi-private education for the middle class, stands in stark contrast to a largely dysfunctional poorly resourced system for the disadvantaged poorer majority. Policy has thus permitted the middle class to secure control of the historically white school sector, facilitating a 'new deracialised middle class' who have 'opted out' of the public system of schooling in favour of semi-privatised schooling. The introduction of 'no fee' schools to address concerns of educational affordability and access in poor communities also fails to address the underlying structural issue of inequality.

Maringe, Masinire and Nkambule (2015) show how multiple deprivation affects a large proportion of schools in South Africa. The authors argue that a broad-brush policy application fails to recognise the contextualised challenges faced in specific schools. The central purpose of the research was to discover the specific challenges and leadership issues that schools in multiple deprived communities face, and to identify ways in which such schools dealt with these challenges. The research was conducted through a case study approach of three schools in one of the most impoverished provinces of the country. The authors found that, while the three schools shared many similar conditions of poverty that drove the poor to marginal performance, stories of success tended to be strongly related to four key factors. These are, first, leadership that went beyond an ordinary focus on instruction; second, staff stability; third, flexible scheduling that allowed parental involvement; and, fourth, a focus on a school-wide project that acted as a rallying point and a source of pride for the entire school.

Moorosi (2010, p. 560), drawing from her research in KZN, argues that transformation should include changes in community attitudes to women:

The interplay between the social and organizational levels becomes stark where the social norms and beliefs appear to be informing what happens in the school context. This perpetuates the reproduction of a continued male domination in the management of a field occupied mostly by women.

Similarly, Naidoo and Perumal (2014, p. 822) claim that 'more still needs to be done in order to redress gender equality in school leadership'. Their research shows that female principals in disadvantaged school communities rely on their own spiritual, ethical, moral and maternal values to help them in their role as leaders. The key finding that emerged from the study is that social expectations of women need to change. Women should be appraised by what they can do, not by their gender, and should not be pressurised into choosing between work and home.

Leadership culture and structures

The transformation of the policy context, and the changing demography of learners and educators, has profound implications for school culture (Zulu, 2004; Villiers and Pretorius, 2011). Nieman and Kotze's (2006, p. 614) survey of 30 school staff in the Free State led them to conclude that school culture is characterised by sociability (friendship and morale) and solidarity (collective will and mutual interest). They also note the links between culture and leadership:

Organisational culture [is] cultivated by management and, therefore, it would be a true asset to a school if a suitable principal could be appointed: a principal who leads in such a way that a culture, in which teaching and learning could thrive, is established (p. 622).

Barnes et al. (2012, p. 73) undertook a similar investigation in the Eastern Cape. Their findings show a clear link between enhanced school culture and climate, and lower levels of violence. Understanding this relationship made it possible for school leaders to institute positive action to recognise culture and climate as a means of securing safer schools.

Vos et al. (2012, 2013) consider the way in which culture is reflected in educators' attitudes to their working environment in primary schools in North-West province. Their findings, based on a survey of 904 teachers in 68 schools, indicate that educators are not only determinants of culture but are affected by it.

The role of the principal in developing a culture of teaching and learning is discussed by Bush (2013, p. 14), who comments that:

Changing school culture has to be a deliberate process, intended to achieve specific results, such as enhanced learner outcomes. Culture is usually deeply embedded and is difficult to shift particularly if, as in most South African schools, most educators have substantial experience in the same school and are used to working in a certain way. It often takes an external stimulus or threat to produce new patterns of working.

Weeks (2012, p. 9), following an extensive literature review, argues that the dysfunctionality of so many schools in South Africa requires a "quest for learning", involving both learners and educators, and building upon their cultural heritage to establish a learning community within the classroom.

Christie et al. (2007) carried out a literature review, and also conducted an enquiry with 18 middle-ranking schools. Their research showed that all these schools had organisational cultures or mindsets that 'supported a work ethic, expected achievement, and acknowledged success, leading to a sense of purpose, commitment, achievement, acknowledged success, and an enabling work ethic' (Christie et al., 2007, p. 5).

Leadership and student outcomes

Heystek (2015) argues that it is a 'formidable challenge' for most school leaders to improve academic results in state schools. In terms of their contracts, principals are accountable for the academic results as reflected in examination and test results for their schools. The Department of Basic Education has made attempts to implement a performance agreement with principals and deputy principals, which would hold them directly and specifically accountable for the examination results. However, research with principals and deputy principals indicates that a performance agreement of this kind is potentially demotivating because they do not feel they would be able to achieve the goals it sets (p. 1).

Moorosi and Bantwini (2016) examine whether and how leadership styles in Eastern Cape school districts support school improvement, through questionnaires and semi-structured interviews with school principals. Their findings reveal the prevalence of more authoritarian top-down leadership styles, which tend to have negative effects on school improvement.

Role of parents

Gwija (2016) examines the role of parents in their children's education and notes that parents play a significant role in improving a school's academic results. The investigation focused on two secondary schools in the Western Cape and the findings revealed that participants overlooked the role of parents. Although they involve parents in some school activities, there is a need for training on how the school principals should optimally involve parents in school activities.

Leadership preparation and development

Since the introduction of the ACE: School Leadership programme there has been growing awareness that the functions of leadership should be exercised by a wider range of people within schools. In their review of the programme, Bush et al. (2011, p. 39) conclude that:

The flexibility and initiative required to lead and manage schools in periods of rapid change suggest that preparation should go beyond training principals to implement the requirements of the hierarchy to developing rounded and confident leaders who are able to engage all school stakeholders in the process of school improvement for the benefit of learners and their communities.

Leadership development is fundamental to change but R. Botha (2011) is critical of the leadership style of authoritarian principals, as a limiting factor in leadership development, and notes the overwhelming need for enhanced professionalism for principals. E. Botha (2012, p. 406) suggests than one approach

might be to create professional learning communities which consider change through talking, asking relevant questions, and making decisions together.

Mentoring for leadership development has been investigated by Msila (2011, p. 51) who, following in-depth observation of 12 mentors and their mentees, notes that:

The mentors and their mentees had a huge role to play in the process; the personalities of the individuals involved were very crucial in their relationship [...] Change agents for both mentors and mentees learn easily and are open to ideas different from their own. In a mentoring relationship, this proves very important because one listens and understands because they have embraced change.

Msila (2011) also points to the need for mentors to be effective in all aspects of their leadership practice and that the development of this approach is dependent upon the availability of trained and respected mentors.

Mestry (2017) shows that the Department of Basic Education has made numerous attempts to raise the professional standards and competencies of school principals by formulating the South African National Professional Qualification for Principalship (DoE, 2004) and, subsequently, the South African Standards for Principalship (SASP). The DBE recognises the current lack of a co-ordinated system to meet these identified needs, and is therefore seeking to develop and implement a system of career pathing for education leaders and managers, and a framework of leadership and management development processes and programmes. It is envisaged that these will be built upon agreed understanding of the core purposes of the leadership roles, the key functions within these, the values which underpin them, and the personal and professional attributes required to carry out the role (p. 8).

Research gaps

This review of research shows a considerable body of evidence about the nature of school leadership in South Africa. However, the data are uneven and some areas of research remain under-developed. For example, a great deal of research focuses on the role of the principal with much less attention to other leadership roles, including deputy principals, heads of departments (HoDs), and school management teams. Similarly, research on functional aspects of leadership and management, such as curriculum, finance, physical resources, and managing people, offers only limited evidence about how these functions are enacted in schools. A feature of much literature on school leadership in South Africa is a normative stance, often connected to a social justice agenda, but with weak empirical underpinning. There are also geographical variations in the availability of research data, with more evidence from Gauteng and the Western Cape, for example, and fewer

papers from other South African contexts, especially from rural areas. Finally, while there are pockets of excellence, there are few major centres for school leadership research, with a critical mass of senior and emerging academics. Given the widely-accepted links between leadership and school improvement, a focused research agenda is required to produce robust evidence to inform policy and practice.

Implications and conclusion

The building blocks for the field of school leadership are policy, theory, research and practice. This review of research in the field draws on theory and offers insights into policy and practice. Recognition of the importance of school leadership is a continuing feature of the policy discourse, beginning with the Task Team report (Department of Education 1996), and continuing with the development and piloting of the national ACE: School Leadership programme, from 2007. However, discontinuities in this strand of policy-making are also evident. For example, in 2011, the Council of Education Ministers announced that the ACE: SL would become a requirement for new principals but this stipulation has not been acted upon. The subsequent intention to replace the ACE with an Advanced Diploma has not advanced beyond the planning stage.

This chapter shows that, while empirical evidence has been growing, it remains inadequate to draw firm conclusions about many aspects of school leadership and management in South Africa. As noted above, some topics still have limited research. In other areas, for example on the role of the principal, and on school governance, there is more relevant literature but some of this is normative and even empirical sources are often based on small-scale projects, for example from a very limited number of case studies. More substantial research is required on many topics, notably leadership preparation, the roles of senior and middle leaders, resource management, and stakeholder participation. New research should include larger-scale projects, comparative cross-cultural studies, and observational studies of leadership practice. In particular, as Bush and Glover (2016) argue, more evidence is required to answer the key research question: Why do most South African schools continue to under-perform?

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