ADVANCED DIPLOMA SCHOOL LEADERSHIP AND MANAGEMENT

IMPLEMENTATION GUIDELINES

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ADVANCED DIPLOMA
SCHOOL LEADERSHIP AND MANAGEMENT

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Department of Basic Education

Implementation Guidelines for the Advanced Diploma: School Leadership and Management

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Acronyms and Abbreviations

ACE (SL)	Advanced Certificate in Education (School Leadership)
AdvDip (SLM)	Advanced Diploma School Leadership and Management
CAPS	Curriculum and Assessment Policy Statement
CoP	Community of Practice
DBE	Department of Basic Education
ELOs	Exit Level Outcomes
HEI	Higher Education Institution
HOD	Head of Department
ICT	Information and Communication Technology
IQMS	Integrated Quality Management System (also see QMS)
LJ	Learning Journal
LoLT	Language of Learning and Teaching
NDP	National Development Plan
NMLC	National Management and Leadership Committee
NQF	National Qualifications Framework
PLC	Professional Learning Community
PP	Professional Portfolio
PPODP	Personal, Professional and Organisational Development Plan
QMS	Integrated Quality Management System
RCL	Representative Council of Learners
REQV	Relative Educational Qualification Value
SASA	South African Schools Act
SASP	South African Standard for Principalship
SAQA	South African Qualifications Authority
SGB	School Governing Body
SMT	School Management Team
WPP	Workplace Project

Background

The Advanced Diploma School Leadership and Management (AdvDip: SLM) represents a new and exciting national initiative in the professional development of practicing and aspirant school principals.

On 15 July 2011 the Minister of Higher Education and Training determined the national policy on the *Minimum Requirements for Teacher Education Qualifications* in terms of Section 8(2)(c) of the National Qualifications Framework Act, 2008 (Act 67 of 2008). This policy was designed to align qualifications for teacher education with the Higher Education Qualifications Framework, 2007. The new policy replaces the Norms and Standards for Educators in Schooling, 2000, in its entirety.

The tabling of the new Qualification Framework and the National Development Plan (NDP) prompted a review of the previous Advanced Certificate in Education: School Leadership (ACE: SL) qualification, as it was now no longer aligned with the new policy requirements. This led to the conceptualisation of a new qualification, the AdvDip (SLM) a qualification that is aligned to the National Qualifications Framework and that is intended to take forward the National Development Plan's (NDP) vision for 2030: Improvement of human resources in the education system and school management.

Following on from the above, a new policy, the South African Standard for Principalship (SASP) was developed by the Department of Basic Education (DBE) in 2015. Its purpose being to respond to the prescripts set out in the National Development Plan in relation to *the improvement of human resources in the education system and school management,* by:

- Facilitating the implementation of an entry qualification for principals;
- Putting in place mechanisms to appoint appropriately qualified and competent principals;
- Changing the appointment process to ensure that competent individuals are attracted to become school principals;
- Setting up better recruitment and selection procedures that provide the basis for improved performance management processes applicable to principals;
- Providing benchmarks against which aspiring principals can be assessed to determine their suitability and to identify the areas in which they may need development and support;
- Benchmarking standards against which principals can identify their personal professional development needs throughout their careers; and
- Providing guidance to those aspiring to be principals on what is expected of a school principal.

To facilitate the implementation of an entry level qualification for principals as envisaged in SASP, the DBE appointed a curriculum development team to design and develop the draft curriculum for the new proposed qualification for school principals, the AdvDip (SLM). Thereafter, the DBE convened a meeting of the National Management and Leadership Committee (NMLC) a national stakeholder meeting comprising representatives from higher education institutions, provincial departments and teacher representative bodies tasked with finalising the core curriculum outline. The AdvDip (SLM) is a 120 credit, professional qualification pegged at Level 7 on the National Qualifications Framework (NQF). The finalisation of the draft AdvDip (SLM) curriculum included engagement with aspects such as a review of:

- credit weightings (per course module)
- sequencing of content,
- the assessment approach, and
- the mentoring and support strategies required to implement the qualification.

The finalised curriculum was approved by the DBE Director-General and published in October 2015.

Like its forerunner, the ACE: SL, the AdvDip (SLM) qualification is to be offered through a national programme, delivered by accredited higher education institutions (HEIs) under the auspices of the DBE and in conjunction with provincial educations departments.

The overall aim of the AdvDip (SLM) qualification is to empower School Management Teams (SMTs) to develop the skills, knowledge and values needed to lead and manage schools, as complex learning organisations, effectively and to contribute to improving the implementation of quality learning and teaching in schools.

Source: Background adapted from the presentation made by J Ndlebe Director: Education Management and Governance Development, DBE, 30 May 2017.

Overall programme approach

The key focus of the AdvDip (SLM) programme is on facilitating real transformation in the quality of education in South African mainstream[1] or public ordinary schools, positive transformation that is grounded in the recognition of the challenges of particular contexts and in the values underpinning the South African Constitution.

It is intended that the AdvDip (SLM) programme participant will develop a deep and systemic understanding of current thinking, practice, theory and methodology in the area of school leadership and management. The seven modules that comprise this qualification focus on relevant areas of educational leadership and management specialisation and not on general educational subjects or fundamentals, as had been the case with the ACE (SL). Overall, when compared with the ACE (SL), the Adv Dip (SLM) provides a strong statement about the knowledge base required by school principals and places significant emphasis on the development of methods of enquiry. This includes the requirement that a research project/investigation/action research project be undertaken. A stronger emphasis on ethics (including research ethics); professional practices; and on the management of own learning and accountability is also evident in the AdvDip (SLM). This requires the development of appropriate high-level academic literacy skills which have been carefully embedded in the design of the programme course materials.

Pursuant of this aim, evidence of changed practice over the duration of the AdvDip (SLM) programme is central to the successful completion of this qualification. It is for this reason that the preparation of a professional portfolio of evidence and the implementation of a workplace project is a compulsory requirement of this programme. All candidates will be required to provide evidence of their ability to apply basic action research methods in their school context and to use the results of this research to make evidence-based decisions and to implement changed practices. Finally, as part of the action-research cycle, the participants will be required to evaluate the impact of changed practices and to make amendments as indicated by the findings.

It is key that participants on this programme understand that it is not acceptable simply to pay lip service to the ideas presented, to develop school polices and guidelines that are not implemented in practice or to adopt a minimal compliance stance. Instead, a deliberate attempt is made to encourage critical reflection on current practices, planning for improvement, action based on informed understandings and monitoring and evaluation that is carefully considered and responsive. The assessment tasks set for participants in this programme, and compiled into a professional portfolio, must yield evidence that the school has changed for the better in ways that reflect a commitment to, and practice of, transformative leadership. In this process, critical issues such as gender equality, socio-cultural and economic relevance, inclusivity, HIV and AIDS, and improved and improving learner performance should be squarely addressed.

1 The term 'mainstream' is used in the Ministerial Committee Report, Christie, P., Butler, D., Potterton, M., 2007 Schools that Work. Pretoria Department of Education.

Structure of this guide

The purpose of this guide is to inform academic staff in Schools/Faculties of Education in Higher Education Institutions on the key design and implementation implications of the programme. It is not intended as a '*How to Guide'*, but rather it is envisioned that this guide will assist academic staff to:

- Understand the key design characteristics of the programme – this includes an overview of the purpose, overall structure of the programme and its constituent parts, and the embedded learning design. This is intended to assist in the identification of key issues which the institution will need to address in planning for the implementation of the programme.
- Take cognizance of the central theories and premises that characterise the conceptual underpinning of this programme. This includes, but is not limited to understanding key concerns in the field of educational leadership and management and what has been privileged in the programme design.
- Understand the assessment approach linked to each module of the programme.

Structure

The guide is divided into four sections as detailed below.

Section 1: Programme overview

Section 2: Overview of programme modules

Section 3: Central concepts and premises underpinning the programme

Section 4: Linking theory and practice

Appendix: Exemplar Professional Portfolio Assessment Matrix

References.

Section 1: Programme overview

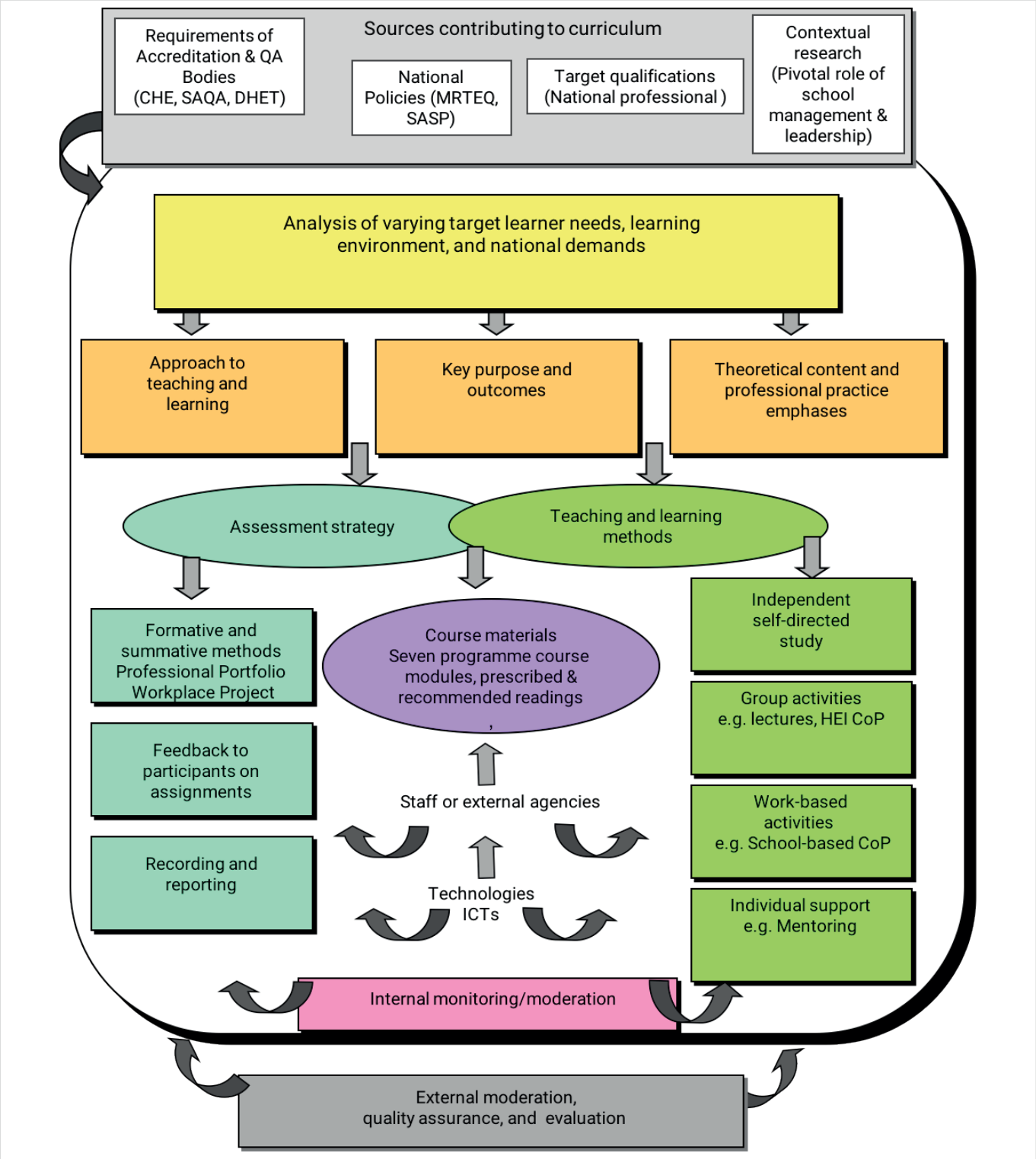
The overall design of the AdvDip (SLM) qualification programme

This section commences with the 'big picture', i.e. the overall design of the AdvDip (SLM) qualification. Thereafter, the rest of Section 1 focuses on providing details related to the programme structure, learning approach and the nature of the materials that comprise the programme course modules.

Figure 1, provides a visual representation of the 'big picture', of how the AdvDip (SLM) qualifications translates into the curriculum design for the implementation of the AdvDip (SLM) programme. It highlights factors that contribute directly to its design such as national policy requirements, findings from research in the education leadership and management field, as well as quality assurance requirements.

The diagram is intended to provide an integrated picture of a complex whole that includes more than just thinking about the number of course content modules and what will be taught. The diagram highlights the key features of the curriculum implementation - the teaching and learning methods to be used. It also sets out the programme assessment strategies and indicates the need for both internal and external monitoring and evaluation mechanisms to be in place to monitor and support curriculum implementation.

Figure 1: The AdvDip (SLM) from qualification to programme curriculum design



Source: Adapted from *Saide*. 2003. *Developing a Curriculum.* Johannesburg. *Saide*.

Who is the AdvDip (SLM) programme for?

The AdvDip (SLM) programme is aimed at empowering school leaders to lead and manage schools

effectively in a time of great change, challenge and opportunity. The programme is targeted primarily at School Management Team (SMT) members who have management experience and who are practicing or aspirant school principals.

What is the purpose of this programme?

The programme seeks to provide a structured professional learning pathway for current and aspirant school principals that will equip them with the knowledge and competences to manage and lead their schools effectively and in alignment with national goals.

The programme provides learning opportunities that are aimed at promoting quality education in South African mainstream schools, i.e. the majority of public ordinary schools, through the development of a corps of education leaders who apply critical understanding, values, knowledge and skills to school leadership and management within the vision of democratic transformation. It seeks to empower/enable these educators to develop the skills, knowledge, and values needed to lead and manage schools effectively and to contribute to improving the implementation of education across the school system. Strategies harnessed to achieve this aim include:

- Improving collaborative and critical leadership and management of the curriculum (including a focus on distributed instructional leadership – leadership of teaching and learning).
- Establishing evidence-based and action-research based decision making in schools.
- Making optimal use of information and communication technology (ICT) for efficient school management.
- Ensuring that schools:
    - are run as efficient and effective learning organisations;
    - work with and for the community;
    - build a caring and supportive school culture and community;
    - contribute to continual strengthening of the school system.

How is the programme structured?

The AdvDip (SLM) programme is a 120-credit qualification, comprising seven modules. The programme has been registered on the NQF at NQF Level 7 with an exit level relative educational qualification value (REQV) of 15.

The total duration of the programme is 24 months on a part-time basis.

The necessary information and communication technology (ICT) competencies equal to those outlined in the National Qualifications Framework (NQF) Level 5 descriptors (http://www.saqa.org.za), are a pre-requisite for participation in this programme (see Table 1).

Table 1: Fundamental and core NQF levels of the programme

Fundamental module	Core modules	Elective modules
Assumed prior learning includes ICT practices at Level 5 See South African Qualifications Authority (SAQA) website; or Minimum Requirements for Teacher Education Qualifications (MRTEQ) (DHET, 2015)	120 credits at NQF Level 7 7 modules	No elective modules

Source: Department of Basic Education. 2015. *Programme outline for Advanced Diploma in School Leadership and Management.* Pretoria: DBE.

The seven modules of the qualification are depicted in Table 2.

Table 2: The modules of the AdvDip (SLM) programme

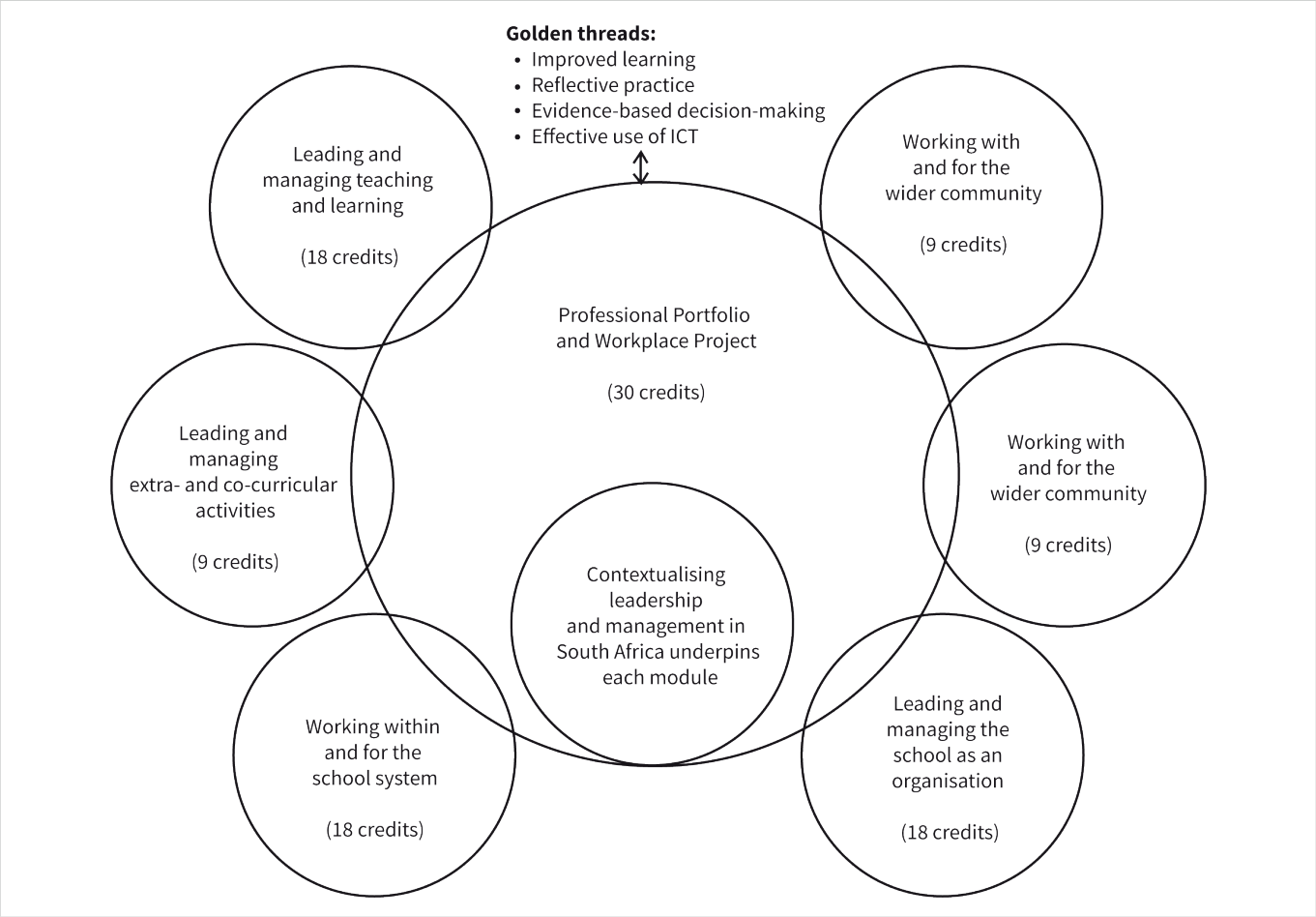
Fundamental	There are no fundamental components *Basic ICT practices at NQF Level 5 is an assumed pre-requisite*		
Core Focus is on the South African context	*Module 1. Professional Portfolio and Workplace Project*	The Professional Portfolio integrates work across the programme and includes a practical Workplace Project	30 credits Level 7
Assessment including self assessment and reflections, formative and summative assessment per module	*Module 2. Leading and managing teaching and learning in the school*	Focus is on applied competence	18 credits Level 7
	Module 3. Leading and managing extra-curricular and co-curricular activities		9 credits Level 7
	Module 4. Leading and managing people and change		18 credits Level 7
	Module 5. Working with and for the wider community		9 credits Level 7
	Module 6. Leading and managing the school as an organisation		18 credits Level 7
	Module 7. Working within and for the school system		18 credits Level 7
Total			**120 credits**

Source: Department of Basic Education. 2015. *Programme outline for Advanced Diploma in School Leadership and Management.* Pretoria: DBE.

The submission of a Professional Portfolio (PP) provides the exit requirement of the programme. The PP includes the Workplace Project (WPP) which provides evidence of the candidate's applied skills and knowledge from each of the other six programme modules. The PP therefore, provides an *integrated* record of the candidate's changed practices over the duration of the programme.

The integrated nature of the AdvDip (SLM) programme is reflected in Figure 2 below.

Figure 2: The components of the AdvDip (SLM) programme



Source: Department of Basic Education. 2015. *Programme outline for Advanced Diploma in School Leadership and Management.* Pretoria: DBE.

Learning approach

A socio-cultural approach to learning and academic literacy development is taken in the AdvDip (SLM) programme course material. This approach is rooted in an understanding of learning as a *social practice* that is embedded in the contexts in which one lives and works (the cultural).

Vygotsky's theory of human learning suggests that it is not possible to separate learning from its social context. His theory of social constructivism, posits the idea that knowledge is individually constructed and socially mediated. In support of this approach and to foster dialogue and social interaction, the design of the programme's learning and teaching materials are underpinned by the following key principles:

- New content knowledge and skills are linked, as much as is possible, to the participant's socio-cultural context. Our 'ways of being and doing and believing' – whether as individuals or communities – are also social practices, so contextually bound, open to contestation, often a struggle for dominance – never neutral.
- New content knowledge and skills are problematised and the view that knowledge is contested is promoted. To encourage critical engagement questions are posed and the related activities are designed to stimulate discussion of different viewpoints.

- Knowledge is presented as open, changing and debatable rather than as fixed and not to be questioned.
- Programme participants are encouraged to deepen their own knowledge independently through additional reading, research and enquiry.
- Participants are encouraged to reflect on new knowledge in relation to their past experiences and to re-evaluate what they know.
- Participants' prior knowledge and experience are valued and used in the development of new ideas and practices.

- The writing style is intended to be conversational in tone and structured to *mediate* new content knowledge, rather than to be didactic. Emphasis is placed on *why* the given content knowledge/skill is important.
- Learning theory points to the fact that people learn best by doing authentic tasks in a socially interactive or collaborative context (Piaget (1936), Vygotsky (1978) and Engeström (1987). The programme materials have therefore been designed to promote an input-action-reflection cycle. (See Figure 3 below).
- Authentic learning, as part of a constructivist approach, conceptualises learning as an active process. Opportunities for the participants to explore how they can apply this knowledge are provided in every module. The basic tenets of authentic *learning activities* include designing learning activities that relate to the real world/real life. Tasks encourage participants to think critically, organise and evaluate data. The participants are therefore required to apply concepts in authentic social or physical environments. This includes identifying problems or areas of weakness in their schools and designing and implementing interventions aimed at strengthening and changing existing practices and evaluating the efficacy of such interventions.
- As part of this socio-cultural approach to learning, it is envisaged that programme participants will set up communities of practice (CoPs). They will be required to set up two types of groups specific to this programme: one with fellow participants on the AdvDip (SLM) programme at the HEI and one with colleagues in their school that will engage with, and provide support for, the implementation of a needs-based school project. Over the timeframe of the AdvDip (SLM) programme implementation, it is hoped that meetings of this Workplace Project team would also provide opportunities for ongoing discussion and reflection on a range of relevant school matters. In this way, the participants are encouraged to co-operate, collaborate and share learning, learn from each other and construct knowledge and meaning together. Working collaboratively, they will need to ensure that they are able to negotiate a range of different individual views, which may or may not agree with their own views. It is hoped that these communities of practice will be extended to the school as a whole, the District and include a range of stakeholders who can work together collectively over the two-year period of the programme.

The learning design cycle

The learning approach described above is graphically depicted in Figure 3, below. This design underpins the approach taken to designing the learning process in each unit of learning. Taken together, the various units of learning form the building blocks that make up a course module, with each of the seven modules focussing on a particular content area in the programme.

Figure 3: Underpinning learning design implemented in the AdvDip (SLM) Programme course materials

Learning principles

The following learning principles underpin the teaching and assessment of the programme:

- Directed and self-directed learning in teams and clusters (institutional and school-based CoPs).
- Site or school-based learning (dependent on nature of the content and activities).
- Contact sessions (block release or other) at the HEIs responsible for providing the AdvDip (SLM) programme.
- Variety of learning strategies, e.g. lectures, site-based mentoring, research activities, writing tasks, portfolios.
- Parallel use throughout of individual and group contexts of learning.
- Collaborative learning through interactive group activities, e.g. simulations, debates.
- Problem-focused deliberation and debate in group contexts.
- Critical reflection on group processes and group effectiveness.
- Critical reflection and reporting on personal growth and insights developed.
- Engagement in research activities and experimentation.

Suggested module implementation sequence

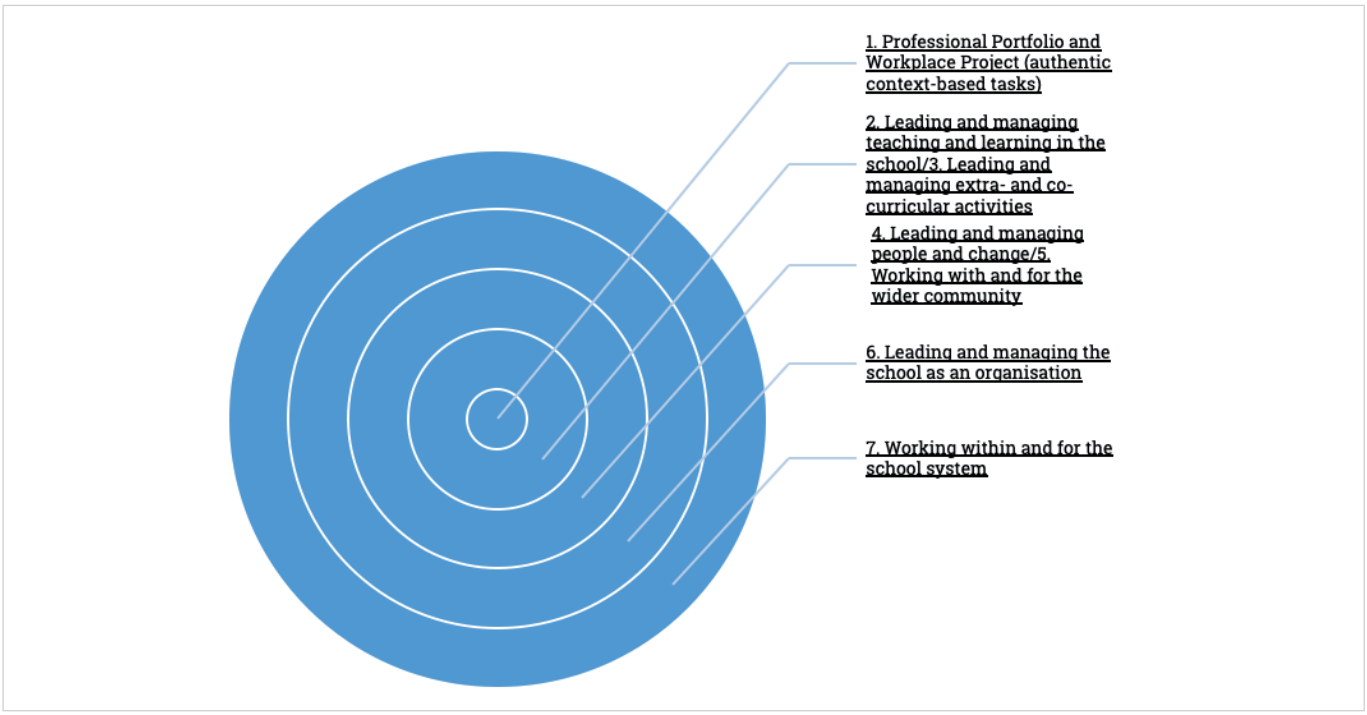
The conceptual development of the programme modules has been based on a Module 1-7 sequence as presented in the DBE AdvDip (SLM) Programme Outline (DBE, 2015). Implementing the modules in this proposed sequence, will help to expedite school-based work; particularly in relation to the implementation of a relevant Workplace Project (WPP). However, the sequence exemplified in the Table 3 below, is intended as a recommendation, rather than being prescriptive. HEIs may, for example, choose to offer *Module 4: Leading and managing people and change* and *Module 5: Working within and for the wider community* together, rather than sequentially. Similarly, *Module 2: Leading and managing teaching and learning in the school* and *Module 3: Leading and managing extra- curricular and co-curricular activities* may also be offered together.

Table 3: Suggested sequence of AdvDip (SLM) module delivery

Year	Module
1	Module 1: Professional Portfolio and Workplace Project
	Module 2: Leading and managing teaching and learning in the school
	Module 3: Leading and managing extra- and co-curricular activities
	Module 4: Leading and managing people and change
2	Module 1: Professional Portfolio and Workplace Project
	Module 5: Working with and for the wider community
	Module 6: Leading and managing the school as an organisation
	Module 7: Working within and for the school system

The sequence of the programme modules (with Modules 2 and 3, and Modules 4 and 5 either undertaken separately or merged) is set out in Figure 4.

Figure 4: Possible, alternate programme module implementation



Source Module 1, Part 1: *Professional Portfolio and Workplace Project*, 2018.

However, regardless of the sequence in which a higher education institution may choose to offer the AdvDip (SLM) programme, *Module 1: Professional Portfolio and Workplace Project*, does need to be the first module implemented as it has been designed to span the whole two year period of the programme implementation. Module 1 comprises two parts, Part 1 provides an introduction to school leadership and management and contextualises current issues in the South African education landscape. It also provides a brief overview of the other six modules that make up the AdvDip (SLM) programme. Part Two, focuses on the school context; on identifying an area that requires improvement in the school; and on designing and implementing a Workplace Project (WPP). The results of the WPP will be presented as evidence for assessment purposes in the participant's Professional Portfolio (PP). The products of these units (the WPP and the PP) constitute the final assessment of the applied competence in school leadership and management. This forms the practical or applied aspect of the programme.

Additionally, the participants are required to cross-refer between the various modules as and when indicated. In this way, participants will be able to make the connections between the seven modules which will help them to see and experience the programme as an integrated whole.

Implementation methods

The overall implementation features of this programme include that it:

- Is materials based – all HEIs are provided with the same set of course materials.
- Is offered part-time over 24 months, applying a blended learning approach of self-directed or independent learning combined with learning and mediation during contact sessions at the HEI.
- Promotes reflection by programme participants through the use of a Learning Journal.
- Requires the establishment of, and learning through CoPs in both the HEI and in school-based settings.
- Is site-based using mentoring and coaching processes.
- Promotes a competence/evidence-based approach centred on the development of a Professional Portfolio and Work Place Project.

The blended approach to the programme implementation may include a combination of contact sessions held over weekends and/or block release contact sessions held at the HEI and implemented outside school hours, for example, during the school holidays. Contact sessions are combined with independent study. Apart from learning support provided by programme lecturers, learning facilitators and tutors, HEIs offering this programme are also required to facilitate site-based support provided by learning facilitators and mentors. Additionally, it is intended that members of the institutional and school-based CoPs will also provide the participants with peer-to-peer learning support. The implementation features highlighted here are expanded on and discussed in more detail in Section 4 of this guide.

The course materials

The course materials, have been designed in a format that is intended to facilitate guided, independent study. This is in line with the 'studying while working' practice-based nature of the programme.

To ensure that HEIs can use and adapt the materials easily, they have been developed in a MS Word template that allows for adaptation. The materials are also provided in a PDF print ready format where institutions can choose to use the materials in their original format without further adaptation.

Website and YouTube links

The course materials (modules) all contain website and YouTube hyperlinks which provide links to relevant policies, readings, videos and pod casts. Participants are required to access and engage with the multimedia content as it is central to the conceptualisation of the programme content.

NOTE:

To obviate the problem of inserting text URLs that are extremely long and hard to copy and paste (and which run the risk of breaking up) use has been made in the programme course materials of TinyURL (https://tinyurl.com/). This is a free web-based service which is used to convert long URLs to tiny, 28 characters URL. TinyURLs will not break when copying and pasting. It is also claimed that they will never expire.

Contact sessions and support

Planning contact sessions

Each HEI will need to define the details related to the specific method and mode of programme implementation that their institution has decided on. This will determine the nature and format of the contact session. To support institutional planning of contact sessions, the following questions should be considered:

- Where and when will contact sessions be offered?
- How frequently will they be offered and what will the duration of each contact session be?
- What should happen during these contact sessions to make the best use of the time available, taking cognisance of the collaborative learning strategies advocated in the programme decision?
- Who will run these contact sessions and how will they be identified, capacitated and trained to do so?
- Who will monitor and support those responsible for the contact sessions through the programme implementation cycle?

It is expected that approximately 240 hours of contact-based support (20 % of notional learning hours) will be offered to participants over the two years of their part-time study. This is the equivalent of 15 days in each 12-month period.

Given that participants are all already in full-time employment, these contact sessions will need to happen after school hours, over weekends or during school holidays (and here care needs to be taken about possible clashes with provincial training initiatives).

It is acknowledged that all HEIs have their own duly performed requirements which the AdvDip (SLM) programme participants will be required to adhere to. However, experience suggests that programme participants will be more willing to attend contact sessions if the dates are known well in advance so that plans can be made and if the venue is easy for the participants to get to and from. This is especially important for those who are dependent on public transport. Participants will also be willing to return to contact sessions if they find them useful and if these are not simply used to communicate programme information. Rather, the contact sessions should be used as an opportunity for the participants to engage with new theoretical content knowledge and well-structured CoP discussions which foster learning. Visits to the HEI for contact sessions, also provide the opportunity for participants to set up one-on-one consultations with lecturers and facilitators and to access various resources.

Each institution will be responsible for setting minimum attendance requirements for contact sessions, for CoP sessions as well as for onsite assessor visits over the two year programme implementation period.

While it is important that programme lecturers, facilitators and mentors at different HEIs realise that they are working on the same national programme and that the materials provided to all institutions offering the AdvDip (SLM) are common, the MS Word format and the issuing of the materials as open educational resources (OER) under a creative commons license, does mean that lecturers can update readings, case studies and assessment activities to keep the materials current. Institutions will also need to give due consideration to assigning relevantly qualified staff and to ensuring that facilitators and mentors/tutors on the programme are appropriately inducted, supported and, monitored.

Assessment in the programme

As a professional development programme, the AdvDip (SLM) is specially offered through a practice-based part-time mode so that participants can work and learn at the same time. Approximately 50% of the work that the participants are required to do for the programme comprises activities that they will plan, execute and evaluate at their school. The role of assessment is therefore primarily based on practice-based assignments and not on the traditional university-style written tasks. Regular feedback to participants is also required.

A transformative agenda is purposively promoted in this programme. By the time participants have completed the programme, it should be possible to provide evidence that their participation has helped to change their school for the better. Assessment in the AdvDip (SLM) programme is therefore focused on applied competence by means of:

- Formative and summative assessment tasks for each module which are scenario, case-study, and/or practice-based.
- Formative assessment will be used to determine the participant's competence against standards and to identify areas requiring further development. Formative assessment results will be used to provide guidance on leadership and management practices.
- The development of a reflective practice, that is, the ability to reflect on one's actions so as to engage in a process of continuous learning is strongly advocated throughout this programme. Participants are encouraged to regularly record their thoughts and reflections on their personal and professional development process as they progress through the programme.
- As indicated earlier, all participants will be required to prepare a Professional Portfolio (PP). The PP is the place in which participants will store the evidence of all the tasks and assignments that they have completed. The contents of the PP will contribute to providing an integrated record of evidence of the level of the participant's applied competence across the programme.
- All participants are also required to identify, *and then address* a priority challenge within the school with learners as the primary beneficiaries. This is the WPP.

See Appendix for the exemplar of the assessment matrix that serves as a guideline, or which can be used as is, in assessing the Professional Portfolio.

It is the prerogative of each HEI to determine the detail of the assessment strategy to be used. However, as a result of the evaluation[2] conducted on the implementation of the ACE (SL) the following recommendation are made.

2 The evaluation of the ACE (SL) was conducted by Bush, T., Duku, T., Glover, D., Kiggundu, E., Kola, S., Msila, V. and Moorosi, P. 2009. School Leadership Research, Final Report. Johannesburg. Zenex Foundation.

ACE (SL) assessment recommendations

It is recommended that lecturers/learning facilitators (mentors and assessor) familiarise themselves with the nature of the activities in the course material and prioritise activities for inclusion in the Professional Portfolio for assessment purposes. A further suggestion was that fewer, more significant, more integrated assessment tasks be set to generate evidence of professional applied competence, rather than too many small tasks.

It was also recommended that the role of the Professional Portfolio (portfolio of practice evidence) be elevated so that all participants understand that without verified evidence of competence in the workplace they will not be awarded the AdvDip (SLM) qualification.

Finally, it was recommended that assessment should be conducted by a range of people, including lecturers, learning facilitators, mentors (support in the field) and assessors (school visits) each contributing to the value of the assessment.

Aligned to these recommendations the HEI programme implementation team need to plan the programme assessment strategy in line with their respective institutional assessment procedures.

Assessment planning

The key assessment tasks for the programme as a whole comprise the Professional Portfolio which is comprised of the various formative assessment tasks and assignments and, the Workplace Project.

Important questions that programme staff (the HEI programme implementation team) will need to consider and respond to as part of the implementation process include:

- What specific tasks and evidence will the institution require with respect to these key elements of the assessment strategy?

Institutions may, and probably will, wish to set additional assessment tasks in addition to the above integrating activities.

- What will these additional tasks comprise of?
- How much study time (notional time) will they require?
- When will participants complete them?
- When and how will they get feedback?
- What will happen if participants do not perform well on these additional tasks?

Many HEIs have student information systems that are premised on modularisation which require a year mark based on work completed throughout the course and an examination mark. In the AdvDip (SLM) the course or module marks can be derived from the assessment tasks included in each module and can be marked in accordance with the assessment processes applied by each of the implementing HEIs.

The two main cross-cutting, integrated tasks required by the programme design (the evaluation of the Professional Portfolio as a whole and a specific mark required for the Workplace Project) are intended to assess the participant's competency levels and can be translated into a marking system that aligns with the HEI's assessment requirements. Module 1, Part 2, Unit 2 of the AdvDip (SLM) provides some information to both programme participants and HEI staff on how the Professional Portfolio is used as an assessment tool. While Unit 4 (of Module 1) discusses how the

programme participants should go about preparing their Personal, Professional and Organisational Development Plan (PPODP). Like the Workplace Project, the PPODP is also a key component of the Professional Portfolio. The PPODP serves to outline the participant's intent in respect of the development areas they identify. The PPODP also forms a record of their progress and lastly, it is intended to shape their plans for improvement beyond the scope of the programme.

There are a number of useful assessment tools in the Module 1, Part 2 Appendix. These include an exemplar to support participants to prepare their PPODP and various guidelines and rubrics for assessing the Work Place Project and the Professional Portfolio as a whole.

Given the transformative imperative of the AdvDip (SLM) programme, it also seems clear that the applied tasks and projects need to be structured to guide participants through a development cycle. This cycle should involve observation, analysis and evaluation of the current state of affairs at the school; identification of areas for improvement; development of a relevant intervention strategy; implementation of the strategy; evaluation, reflection and re-planning. If the programme fails to engage participants in activities of this nature, it cannot bring about the envisioned change.

The professional portfolio needs to be more than simply a collection of information. It needs to tell a story about the participant's experiences and growth throughout the programme as well as indicating the breadth and depth of their learning. Clearly, there must be a careful orientation to the

portfolio and continuing support thereafter. Participants must also realise that although they can include evidence of achievement in the form of work outputs from the various modules, what will make that evidence an appropriate portfolio item will be the accompanying reflective narrative explaining the rationale for their choice and what they have learned from the process.

Providing feedback on assessment

Given the relatively limited direct contact with programme participants, feedback on assessment is a particularly critical aspect of the programme.

As highlighted above, institutional programme implementation teams will need to give consideration to:

- How to communicate feedback to programme participants?
- What type of capacity building and support assessment staff (tutors, facilitators, mentors/ coaches) will need to receive in relation to providing assessment feedback to participants?
- How will marking and assessment be standardised and monitored?

The provision of feedback on assessment is a critical aspect of the outcomes-based nature of

the AdvDip (SLM) programme. It is vitally important at the beginning of the programme to

review the programme exit level outcomes (ELOs) and the learning outcomes that underpin each module of the AdvDip (SLM) programme. It will be necessary to return to these often as the participants work through the programme so that everybody is constantly informed by the purpose and intent of the qualification.

It is likely that each module will have tasks and assignments that need to be completed and submitted for assessment. It is important that these are discussed before the participants attempt them and again after they have attempted them. No participant should have to 'guess' what the task requires or how it will be assessed. Given the limited nature of the face-to-face contact that HEIs are likely to have with programme participants, the written feedback that markers provide on the participant's assignments becomes all the more critical.

Using the key assessment tasks as a teaching tool in this way can help to:

- consolidate learning
- check progress
- provide academic support
- motivate
- contribute to ongoing course development (if it is found that the majority of the participants have problems, perhaps the task itself is inappropriate or inadequately scaffolded).

Ideally, to ensure consistency of assessment across the programme, all assignments should be assessed through group marking strategies.

Section 2: Brief overview of the programme modules

In the South African Standard for Principalship (SASP) (SASP, 2015: 10) eight areas of leadership and management are defined, these are:

1. Leading teaching and learning in the school.
2. Shaping the direction and development of the school.
3. Managing quality 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 extra-mural activities.

The seven course modules of the AdvDip (SLM) programme, together, seek to address all these areas with certain themes such as *developing and empowering self and others, managing quality*, *securing accountability*, *promoting a distributed approach to leadership and management with a transformative leadership intent,* cutting across all modules.

This brief overview provided below can be cross-referenced with the relevant module outcomes set out in the module outlines.

Module 1: Professional Portfolio and Workplace Project

Module 1 has two parts:

Part 1 is comprised of Unit 1. This offers an introduction to school leadership and management and contextualises current issues in the South African education landscape. It also provides a brief overview of the other six modules that make up the AdvDip (SLM) programme. Part 1 focusses on learning (content and context) while the focus of Part 2 is on putting learning into practice.

> **Part 2** comprises Units 2, 3 and 4. It should be noted that these three units need to be implemented *concurrently* throughout the two year duration of the programme. The focus in these units is on the school context; on identifying an area that requires improvement in the school; and on designing and implementing a Workplace Project (WPP). The results of the WPP will be presented as evidence for assessment purposes in the Professional Portfolio (PP). Unit 4 focuses on the preparation of the Personal, Professional Organisational Development Plan (PPODP). The outcomes of these units (the WPP, the PP and the PPODP) constitute the final assessment of the applied competence in school leadership and management. This forms the practical or applied aspect of the programme.

Module 2: Leading and managing teaching and learning in the school

This module aims to emphasise that schools exist to provide systematic, quality learning opportunities for children and therefore that effective leadership and management of teaching and learning is a critical role for the school principal. It helps aspirant and practicing principals to see that all other leadership and management roles and functions of the school must serve and support this primary purpose of the school. The module will equip them with the necessary competencies to lead quality teaching, manage curriculum implementation effectively and track and support improved learning.

While this module focuses on instructional leadership, it does so with a vision of the future which relates to transformation. This move from an instructional to a transformative mode (of caring, building trust and collaboration) allows for the support and development of staff to improve on their delivery of the curriculum. It allows the principal to become a capacity and culture builder, one who realistically responds to the changing needs of the school context, as well as the broader education scenario.

> *Rather than focusing specifically on direct coordination, control and supervision of curriculum and instruction, transformational leadership seeks to build the organisation's capacity to select its purposes and support the development of changes to practices of teaching and learning. Transformational leadership may be viewed as distributed in that it focuses on a shared vision and shared commitment to school change (Hallinger, 2003: 331–332)*[3]

The general principles and requirements of leadership of the teaching and learning process, which can be applied to all schools nationally and internationally, are introduced and explored, but the application and understanding of these in the South African context will be emphasised. This module builds upon the theories, knowledge and practice of leadership and management of people, underpinned by the South African legal, policy and financial requirements in schools, which are introduced in three of the other modules (i.e. Modules 4, 6 and 7). It focusses on the role of the curriculum or instructional leader in building a learning organisation collaboratively with all relevant teaching staff. This enables the creation of conditions under which high quality teaching and learning takes place and which can be monitored, evaluated and improved within the school development process, and in the light of internal and external curricular and policy changes.

Module 3: Leading and managing extra-curricular and co-curricular activities

This module complements the theory and practices covered in *Module 2: Leading and managing teaching and learning in the school.* Module 3 focusses on developing effective leadership and management of extra-curricular and co-curricular activities as integral to the development of well-rounded individuals. As has been mentioned above, in some universities and higher education institutions, it may be taught as a separate module, while in others it may be integrated or taught jointly with *Module 2: Leading and managing teaching and learning in the school.*

General principles of leadership of the extra-curricular and co-curricular learning process, applicable to all schools nationally and internationally, are explored in this module. The focus is on innovative approaches that address the challenges and constraints of the South African educational context. A context in which most schools have limited resources and funding. This module also emphasises the importance of developing the learner voice, agency and leadership through extra-curricular and co-curricular activities. The role of the school management team (SMT)

3 Hallinger, P. 2003. Leading educational change: reflections on the practice of instructional and transformational leadership. Cambridge Journal of Education, 33(3): 329–352.

in providing the vision and support necessary to develop and manage strategies to address these matters and challenges is also highlighted.

Module 4: Leading and managing people and change

This module emphasises people as the key resource of the school and explores the need for both theoretical understanding and practical competences in the leadership and management of them. This includes the management of oneself and others in both the school and the wider school community. In particular, this module focuses on value-based, ethical leadership. Education is conceptualised as being intrinsically about *change* and that the change process needs to be led and managed effectively to facilitate ongoing improvement in and for the school.

Module 5: Working with and for the wider community

> *Good principals recognise that their schools can only be as good as the communities in which they are situated and thus make community engagement and improvement a primary goal of school leadership (Grant, Gardner, Kajee, Moodley and Somaroo 2010)*[4]

The purpose of Module 5 is to develop the participants' knowledge of the social and economic communities within which their schools are located. In South African policy, schools are conceptualised as being *centres of the community*. It is with this in mind that Module 5 seeks to promote and establish positive collaborative relationships between schools and the communities in which they are located. It is important for school principals to take cognisance of the influence that communities can have on the school, the school's leadership and management staff and structures. Equally important is for the school leadership to think about the ways in which the school has influence on and can impact the community. The wider community that the school serves can provide a source of support and resources for the school. In turn, the school itself can play a key role in the wellbeing and development of the community. In summary, the module is about establishing collaborative and mutually beneficial relationships with the community in which the school is located.

Module 6: Leading and managing the school as an organisation

This module helps participants to develop an integrated understanding of the school as an organisation, that is to conceptualise the school as social unit of people that is structured and managed to meet a need or to pursue collective goals. All organisations have a management structure that determines relationships between the different activities and the members, and subdivides and assigns roles, responsibilities, and authority to carry out different tasks. Finally, it is important to realise that organisations are open systems - they affect and are affected by their environment.

In Module 6, participants are support to evaluate and apply this understanding to managing organisational systems holistically *in context*; including the management and use of ICT, physical and financial resources. This module also addresses issues related to building and enhancing the school as a safe, disciplined and caring environment conducive to effective teaching and learning.

4 Grant C., Gardner K., Kajee F., Moodley R. and Somaroo, S. 2010. Teacher leadership: a survey analysis of KwaZulu-Natal teachers' perceptions, South African Journal of Education, 30 (3): 401-419

Module 7: Working within and for the school system

This module aims to help aspirant and practicing principals to locate the school and its practices within the wider context of the education system, and underpins the core purpose of schooling: to provide quality teaching and learning, safely, securely and in accordance with legislation and policy. The module therefore addresses issues related to the Constitution, law, policy, governance, school planning and school development. It examines the role of the principal and school management team in the leadership and management of these issues in their schools. The module also explores how values, vision and mission can be developed and communicated within the school as an organisation, and the personal characteristics and knowledge required of the principal in establishing, leading and maintaining these key areas, in collaboration with key stakeholders. It foregrounds the knowledge and skills which school leader must have and the actions which school leaders must take to comply with the legislative and policy requirements that are critical to the functionality of the school.

Section 3: Central concepts and premises

In this section, the central concepts and premises that underpin the programme design are highlighted and discussed. This includes, but is not limited to, understanding key concerns in the field of educational leadership and management and understanding how *leadership* and *management* are conceptualised in this programme. Key content that has been privileged in the programme design is also highlighted in this section.

Understanding the context of mainstream schools

A key concern in the education leadership and management field has been the decontextualisation of knowledge. In this programme, great emphasis is placed on a range of contextual issues that apply to the majority of South African schools. The profound inequalities in the schooling system, which has not shed its apartheid legacies, have resulted in what Spaull[5] (undated), Fleish (2008)[6] and others have referred to as the 20:80 divide, with the majority (approximately 80%) of schools being located in poor communities, not well-provisioned, and attended by black learners.

The *Schools that Work Report* (Christie, Butler and Potterton 2007)[7] argues that the landscape of schooling in South Africa is often misperceived, in that the image of what a "normal" school is (including the "normal" work of principals) does not hold a dominant or valued place in the minds of policy makers and the general public. Instead, the image of former white schools provides the "hegemonic norm" to which the system aspires – although they are in fact a comparatively small and relatively privileged minority of schools.

In the majority of schools, the effects of poverty are evident in *all aspects of schooling*: in physical infrastructure, in the provision of laboratories and libraries, in classroom conditions, and so on. They are also evident in the levels of functionality of schools, the quality of teaching and learning in classrooms, and the results achieved.

Nonetheless, the *Schools that Work* report shows that it is possible to achieve success in mainstream schools – *albeit "success against the odds"* (Christie, Butler and Potterton 2007).

As mentioned in Section 1, the term *mainstream schools* is used in this programme to denote the *majority of schools.*

Programme participants are further encouraged to undertake a situational analysis which will help them to develop a more nuanced understanding of the specific context of *their* school community. The importance of trying to understand the context of each school is stressed to try and ensure that any school-based tasks and interventions implemented *are* relevant to their specific school context.

5 Spaull, N., (undated) A Price too high to pay? Accessed from: https://www.gtac.gov.za/Eventdocs/11.%20Equity%20A%20Price%20Too%20High%20to%20Pay%20by%20Nic%20Spaull.pdf

6 Fleish, B., 2008. Primary education in crisis: Why South African children underachieve in in reading and mathematics. JUTA. Cape Town.

7 Christie, P., Butler, D. & Potterton, M. 2007. Schools that work. (Report to the Minister of Education: Ministerial Committee on Schools that Work.) Accessed from: http://www.education.uct.ac.za/sites/default/files/image_tool/images/104/schoolsthatwork.pdf

How are leadership and management understood?

In the education leadership and management field, there are many instances in which leadership and management are used interchangeable or conflated. In this programme, lleadership and management are understood to be distinctive, though inter-related.

In the journal article, *Landscapes of Leadership in South African Schools: Mapping the Changes,* Christie elaborates on the distinction between leadership and management as follows:

> *Leadership may be understood as a relationship of influence directed towards goals or outcomes, whether formal or informal. Though leadership is often framed in terms of individual qualities, it may more usefully be framed in terms of a social relationship of power whereby some are able to influence others. In Weber's classic approach, the authority of the leader may be based in tradition, charisma and/ or legal rational government. Whatever its basis, leadership is characterized by influence and consent rather than coercion. Nonetheless, as an exercise of power, it necessarily entails ethical considerations (Bottery, 1992; Grace, 1995). Since it is directed towards achieving goals, leadership is often associated with vision and values (Christie, 2010: 695 - 696)*[8].

Leadership is not bound to a formal organisation. Leadership cannot be reduced to a "how-to manual for aspiring managers" (Foster, in J. Smyth (Ed.), 1989: 39- 62)[9] and therefore it is import to guard against conflating these two concepts.

Leadership is conceptualised as a social relationship of power directed towards goals and situated in its social, historical and cultural context (Spillane, Halverson and Diamond, 2004)[10]. It is about the vision of something better, it is about disruption, about taking initiative and about actively trying to bring about positive change. Rizvi's conceptualises leadership like energy, stating that in an organisation dedicated to democracy, it should emerge organically (Rizvi, in J. Smyth (Ed.), 1989: 205–234)[11].

Christie continues, that, in contrast to leadership, *management* is an organisational concept:

> *It relates to structures and processes by which organizations meet their goals and central purposes (Buchanan and Huczynski, 1997). Arguably, it is more likely to be tied to formal positions than to persons. (Christie, 2010: 695 – 696).*

In her writing, Christie emphasises that there is ample research in South Africa to suggest that good management is essential for the functioning of schools and that if schools are not competently managed, the primary task and central purpose of the school - teaching and learning - is likely to suffer.

Whereas, in South Africa historically, there has been a dominance of managerialist discourse at expense of discourse related leadership which it is important to redress, neither management, nor leadership should be ignore at the expense of the other.

It is therefore important that issues related to *both* leadership and management practices are thoroughly examined during the course of the programme, while at the same time taking cognisance of when the focus needs to be on the leadership role of the principal and when the focus should be on the management role.

8 Christie, P. 2010. Landscapes of Leadership in South African Schools: Mapping the Changes. Educational Management Administration & Leadership (EMAL) 38(6) 694–711. SAGE. UK. http://ema.sagepub.com/content/38/6/694

9 Foster, W. (1989). Towards a critical practice of leadership. In J. Smyth (Ed.), Critical perspectives on educational leadership, 39–62. London: RoutledgeFalmer.

10 Spillane, J. P., Halverson, R. & Diamond, J. B. 2004. Towards a theory of leadership practice: A distributed perspective. Journal of Curriculum Studies, 36(1), 3-34. https://doi.org/10.1080/0022027032000106726

11 Rizvi, F. (1989). In defence of organisational democracy. In J. Smyth (Ed.), Critical perspectives on educational leadership, 205–234. London: RoutledgeFalmer.

How do school leaders build a socially just school community?

Leadership as a social justice practice is one of the important areas explored in this programme. This is a critical question that all participants on this programme are encouraged to engage with. Although schooling in South Africa has been formally desegregated for almost 25 years, class-based educational institutions, continuing disparities and inequities, and poor academic achievement are key features of the contemporary school system. While recognising that social justice and equity are complex and difficult to realise, it is crucial to "animate and invigorate a social justice, social cohesion transformation agenda for education" (Sayed, 2016)[12].

Sayed further states that:

> *Creating social cohesion is everyone's responsibility. It requires political will, a shared consensus and participation in processes even though this may be distinctly uncomfortable.*
>
> *Political will is demonstrated through leadership that prioritises achieving social cohesion, which changes unequal, system-wide relationships of power and is focused on improving education quality.*
>
> *…But none of this will work without a shared consensus and participation. Every stakeholder in the education system and beyond must be committed to social cohesion.*
>
> *…When it comes to teaching and learning, a socially cohesive approach will recognise difference, although not to such an extent that difference itself becomes a source of division and differentiation between social groups. In socially cohesive schools, teachers listen to pupils and place them at the centre. They seek consciously to support all pupils, irrespective of their social backgrounds. On the governance side, a socially cohesive school will promote democratic participation and engagement across the board. This involves the members of the school, other schools and its community.*
>
> *These schools will be able to develop active strategies to provide contact as starting points for breaking down barriers. They will be able to affirm and enact rights, including those in the country's Constitution. More fundamentally, it's about realising rights in daily practices and in the way that teachers behave and teach (Sayed 2016).*

Social justice, like education, has to be a deliberate and explicit intervention that requires the moral use of power that is tailored to the specific needs and context of the school community (Shield, 2014). It is the responsibility of school leadership to translate visions into socially and educationally just actions by dealing with diversity and marginalisation – by challenging unequal power relationships based on race, ethnicity, gender, sexual orientation, disability, language or religion.

Shield presents a strong argument for the need for a robust theory of educational leadership that helps students (the programme participants) to understand their roles in perpetuating or addressing disparities and inequities in the world. Shield distinguishes among transformative leadership theory and many others prevalent in the twenty-first century and argues that transformative leadership is a theory that undergirds both social justice education and high academic achievement (Shield, 2014)[13].

12 Sayed, Y. Social justice starts at school. 16 Sept 2016 Mail & Guardian

13 Shields C.M. 2014. Leadership for Social Justice Education: A Critical Transformative Approach. In Bogotch I. & Shields C. (Eds). International Handbook of Educational Leadership and Social (In)Justice. Springer International Handbooks of Education, vol 29. Springer, Dordrecht.

Principals who believe in, value, and are committed to the inclusion of all members of the school community; are willing to continuously examine their own assumptions, beliefs, and practices; value the benefits that diversity brings to the school community; and develop a safe, supportive, and caring schools are likely to positively impact the culture of those schools and the learners and teachers they serve (Diez and Murrell, 2010)[14].

In this programme issues related to social justice are framed from the outset by the values espoused in the South African Constitution and Bill of Rights that are first discussed in Module 1, Unit 1 and extensively discussed in Module 7 of the programme. Leadership for social justice is explored in some detail in Module 5 and related concepts such as value based and ethical leadership are discussed in Module 4, Units 1 and 2.

It takes a team: Distributed leadership rather than delegation

In the Department of Basic Education *Policy on the South African Standards for Principalship*. (DBE, 2015)[15] the role of the principal as *enabler of leadership in others* (or distributive leadership) is characterised as central to transformative leadership.

The concept of distributed leadership is well set out in the following extracts from an article by the US academic, James Spillane[16]:

> *Our distributed framework involves two core aspects: principal plus and practice... The "principal plus" aspect acknowledges that multiple individuals are involved in leading and managing schools. The "practice" aspect prioritises the practice of leading and managing and frames this practice as emerging from interactions among school leaders and followers, mediated by the situation in which the work occurs. In our view, practice is more about interaction than action. Putting practice centre stage allows us to focus where the "rubber" of school leadership and management meets the "road" of instructional improvement.*
>
> *While allowing for the occasional hero or heroine in school leadership, our distributed*
>
> *frame presses us to reach beyond the principal to pay attention to other designated*
>
> *leaders. The work of leading and managing involves a cast of others in addition to the*
>
> *principal, such as assistant principals, curriculum specialists, mentor teachers, and*
>
> *department chairs. Our distributed perspective is not a blueprint for leading and managing. Rather, it's a framework for researchers and practitioners to use in diagnosing the practice of leading and managing and designing for its improvement.* (emphasis added)

The concept of distributive leadership is interrelated with a cluster of concepts relating to leadership, including, leadership for social justice and transformative leadership (Shields, 2014). The conceptualisation of distributed leadership requires the programme participants to make a paradigm shift. Instead of the focus being on the *what* of school leadership and management (on what is being done by school leaders), the focus in this programme is on

14 Diez, M.E., and Murrell, P.C. (Eds) 2010. Teaching as a Moral Practice: Defining, Developing, and Assessing Professional Dispositions in Teacher Education. Harvard Education Press.

15 The Department of Basic Education. 2015. Policy on the South African Standards for Principalship. Pretoria. DBE.

16 Managing to Lead: Reframing School Leadership and Management Author(s): James P. Spillane Reviewed work(s):Source: The Phi Delta Kappan, Vol. 91, No. 3 (Nov., 2009), pp. 70-73Published by: Phi Delta Kappa International https://eep581.files.wordpress.com/2013/02/spillane2.pdf

how it is being done. This implies a shift away from the individualised role or function of the designated leader, to understanding leadership as a shared effort by more than one person. Distributed leadership is about the *process* required to enable various stakeholders or members of the school community to work in concert. For example, to work jointly to establish instructional leadership *teams* can provide an opportunity for building strong leadership for teaching and learning that can help to address the many real challenges that present themselves in the school.

Participants in this programme, do however need to be mindful of the fact that this approach to leadership, does not mean that the principal is somehow released from their responsibilities. Using the example above, the leadership of the principal remains critical in building distributed instructional leadership. The principal's leadership though, is also strengthened as they work to model effective leadership behaviour and develop the instructional leadership capacity of heads of department and teacher's teams or Professional Learning Communities (PLCs). These are groups of teachers brought together to improve collaboration, coordinate work and share the best teaching practices.

Heads of Department (HoDs) are ideally situated to carry out distributed instructional leadership because they have the main responsibility for curriculum implementation. In his *systematic review of the literature on school leadership and management in South Africa,* Bush (2016)[17] references various academic studies that point to the fact that, although, the majority of HoDs identify '*monitoring the teaching and learning standards of educators and learners'* as one of their major contributions to school improvement, this is often not the case. Despite their potential to be important change agents and school leaders, the role of HoDs is often ill-defined, and constrained to Departmental management activities, rather than instructional leadership planning, monitoring and supporting teaching and learning.

Bush also suggests that the '*monitoring the teaching and learning standards of educators and learners*' needs to be unpacked and guidance provided on the kind of support and professional development that HoDs need, in order to be able to give substance to their instructional leadership roles. This requires a shift from a narrow managerialist/ compliance approach with its key focus on 'monitoring' to an approach that instils the value of embedding the following support and capacity building activities:

- Holding regular meetings of the educator team to plan teaching collaboratively and to discuss problems.
- Modelling good practice by teaching lessons while educators observe.
- Observing educators regularly and providing structured and constructive feedback to enhance teaching and learning.
- Evaluating learner outcomes (using assessment data) to design strategies to improve classroom practice.
- Monitoring the work of educators through scrutiny of work plans and learner outcomes.

If teaching and learning are to improve significantly, HoDs will have to spend much more time on the teaching and learning activities that occur daily in their subject or learning area.

Unfortunately, HoD leadership capacity building is often not the focus of professional development in South Africa with HoDs receiving only limited training for their role as an instructional leader. This situation clearly needs to change. It is therefore hoped that the AdvDip (SLM) will provide the necessary catalyst for such change to occur.

Despite the fact that deputy principals are important members of the pipeline for school principal positions, they are also often not developed as instructional leaders (Marshall and Hooley, 2006)[18]. Building the instructional leadership capacity of the management team (SMT) as a whole, increases distributed instructional leadership as it strengthens the pipeline for the principalship.

17 Bush, T. 2016. School leadership and management in South Africa Article. International Journal of Educational Management 30(2): 211-231.
18 Marshall, C., and Hooley, RM. 2006. The Assistant Principal: Leadership Choices and Challenges. Corwin Press. California.

While the focus in the examples above is on the possibility of enhancing the instructional leadership roles of HoDs and deputy principals, other options for distributed leadership development should also be considered. Teacher leaders with emergent leadership skills related to formal curriculum implementation or to extra-and co-curricular activities need to be supported to fulfil clearly defined leadership roles. Whether it is a commitment to advancing learning outcomes in their own classroom, their department, or by playing a leadership role in a PLC strengthening the quality of teaching depends on enhancing the instructional leadership roles of teachers.

As has been emphasised, throughout these guidelines, the core objective of any school is to provide high quality teaching and learning opportunities and to support all learners to achieve success. The core role of principals therefore is to shape the environment for teaching and learning. This programme operates from the premise that the most effective principals create vibrant learning communities where all staff collaborate to help every learner fulfil their potential.

However, research by Hoadley, Christie and Ward[19] and Bush, Joubert, Kiggundu & van Rooyen (2010) [20] points to the history of autocratic and hierarchical leadership in South African schools and caution that for a distributive leadership approach to be implemented, major shifts are required. Grant, Gardner, Kajee, Moodle and Somaroo (2010: 416)[21] survey of 81 schools in KwaZulu-Natal also led them to confirm a similar view based on an earlier study, i.e. that the nature of teacher leadership in many KwaZulu-Natal schools was very limited. Grant (2006: 529).[22] She 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*".

Module 2 of this programme focusses on *leading and managing teaching and learning* and examines distributed leadership in relation to enhancing the quality of teaching. Distributed leadership is also explored in relation to the *school as a learning organisation*. Much emphasis is placed on both teacher and learner leadership in Module 3: *Leading and managing extra- curricular and co-curricular activities.* In Module 3 and Module 7: *Working within and for the school system*, the role of learner leadership is discussed as well in relationship to the role and function of the Representative Council of Learners (RCL).

Transformative versus transformational leadership

Many post 1994 South African policy and guideline documents make reference to the transformational imperative of education. It is therefore important to be clear about the difference between the *transformative* and *transformational*.

To tease out the difference between these two approaches it is necessary to understand the theoretical underpinning of *transformative* leadership which is distinct from the theory of *transformational* leadership. This will help to avoid the type of slippage which may occur when these terms are inadvertently used as though they are interchangeable.

Shields in her journal article, *Transformative Leadership: Working for Equity in Diverse Contexts* (Shields, 2010)[23] states that:

19 Hoadley, U., Christie, P. and Ward, C.L. (2009)'Managing to learn: instructional leadership in South African secondary schools', School Leadership & Management, 29: 4,373 — 389. Accessed at: http://dx.doi.org/10.1080/13632430903152054

20 Bush, T., Joubert, R., Kiggundu, E. & van Rooyen, J. 2010, Managing teaching and learning in South African schools, International Journal of Educational Development, 30(2), 162-168

21 Grant C., Gardner K., Kajee F., Moodley R. and Somaroo, S. 2010. Teacher leadership: a survey analysis of KwaZulu-Natal teachers' perceptions, South African Journal of Education, 30 (3): 401-419

22 Grant, C. 2006. Emerging voices on teacher leadership: Some South African views, Educational Management, Administration and Leadership, 34 (4): 511-532

23 Shields, C.M. 2010. Transformative Leadership: Working for Equity in Diverse Contexts. Educational Administration Quarterly 46(4) 558–589. SAGE New York.

> *Transformative leadership (as opposed to either transactional or transformational leadership) takes seriously Freire's (1998) contention "that education is not the ultimate lever for social transformation, but without it transformation cannot occur" (p. 37). Transformative leadership begins with questions of justice and democracy; it critiques inequitable practices and offers the promise not only of greater individual achievement but of a better life lived in common with others. Transformative leadership, therefore, inextricably links education and educational leadership with the wider social context within which it is embedded. Thus, it is my contention that transformative leadership and leadership for inclusive and socially just learning environments are inextricably related* (emphasis added).

Shields also suggests that *transformative* leadership holds,

> *the most promise and potential to meet both the academic and the social justice needs of complex, diverse, and beleaguered education systems* (Shields, 2010).

In her article, *Transformative Leadership: Working for Equity in Diverse Contexts,* Shields (2010: 563) provides a table in which she compares three theories, i.e. transactional, transformational, and transformative that have, in various ways, dominated the field of educational leadership for many years. However, for the purposes of this discussion, the table has been adapted to demonstrate the differences between only *two* theories, namely, *transformational* and *transformative*.

Table 4: Depicts the distinction between transformational and transformative leadership

	Transformational leadership	**Transformative leadership**
Starting point	Need for the organization to run smoothly and efficiently	Material realities & disparities outside the organization that impinge of the success of individuals, groups, & organization as a whole.
Foundation	Meet the needs of complex & diverse systems	Critique & promise
Emphasis	Organization	Deep & equitable change in social conditions
Process	Understanding of organizational culture; setting directions, developing people, redesigning the organization, and managing the instructional program	Deconstruction and reconstruction of social/cultural knowledge frameworks that generate inequity, acknowledgement of power, & privilege; dialectic between individual & social
Key values	Liberty, justice, equality	Liberation, emancipation, democracy, equity, justice
Goal	Organizational change; effectiveness	Individual, organizational, & societal transformation
Power	Inspirational	Positional, hegemonic, tool for oppression as well as for action
Leader	Looks for motive, develops common purpose, focuses on organizational goals	Lives with tension, & challenge; requires moral courage, activism
Related theories	School effectiveness, School reform, School improvement, Instructional leadership	Critical theories (race, gender), Cultural and social reproduction, Leadership for social justice

Source: Adapted from Shields, 2010: 563.

Transformational leadership, can be defined as a type of leadership style that leads to positive changes in those who *follow*. Transformational leaders are generally energetic, enthusiastic and passionate. Not only are these leaders concerned and involved in the process; they are also focused on helping every member of the group to succeed as well. However, while this approach to leadership may bear fruit, it is often directly linked to the individual that is driving the process, it therefore raises question related to sustainability. Additionally, with so much vested in the individual leader, it is also likely to have limited transferability across contexts.

As has been seen above, *transformative* leadership has its roots in the work of Freire (1970) who emphasised *change* as an important outcome of education and Burns (1978) who placed much emphasis on *purposeful moral* leadership. Burns also acknowledged that leadership necessarily includes an *understanding of historical and social causation*, of power wielding and political power. William Foster (1986) another early theorist to discuss *transformative* educational leadership, posited that leadership "*must be critically educative; it can not only look at the conditions in which we live, but it must also decide how to change them*" (Foster, 1986 in Shields, 2010).

It is important to note that these differences are not simply about definitions; they suggest different leadership priorities. *Transformational* leadership focuses on improving organisational qualities, dimensions, and effectiveness. While *transformative* educational leadership begins the change process by acknowledging and challenging inappropriate uses of power and privilege that create or perpetuate inequity and injustice.

The discussion of transformative, distributed and teacher leadership shows that the introduction of these approaches to leadership in South African schools is inhibited in many schools by entrenched autocratic and hierarchical managerial leadership. Although academic insights (through research) have changed over recent years, there is still little evidence that these emerging models are widely practiced in schools. This highlights the need for deep engagement with these concepts and approaches in the AdvDip (SLM) programme.

Transformative practice as characterised in this discussion, is likely to require a change in the programme participant's frame of reference (a paradigm shift). This may be facilitated by a combination of individual learning; the practice of self-reflection as a tool for deep and lasting personal change; and by emphasising the need to *de*construct and *re*construct knowledge frameworks as well as to "develop an appreciation of our own culture and the associated privileges and powers" (Shields, 2010).

Section 4: Linking theory and practice: What has been privileged?

The Department of Basic Education *Policy on the South African Standards for Principalship*. (DBE, 2015)[24] characterises a school leader as a:

- scholar
- researcher
- reflective practitioner
- enabler of leadership in others,

Related to this characterisation of a school leader, the AdvDip (SLM) programme outline provides a diagram that sets out the seven content knowledge areas that are the focus of this programme as well as illustrating its integrated nature (DBE, 2015: 8). The diagram Figure 2 (on page 12 above) also depicts the 'golden threads' as they have been called in the DBE document, or cross cutting elements that bind the seven course modules together:

- Improved learning in schools
- Reflective practice.
- Evidence-based decision-making.

These are key aspects that underpin the programme design. Additionally, on the recommendation of the DBE convened National Management and Leadership Committee (NMLC) discussion of the following content has been included in the programme course materials: The integration of decolonisation and coloniality debates and Foundation Phase leadership. The call for decolonising education has highlighted the urgent need to shift debate towards consideration about the terms on which knowledge selection for a decolonial curricular approach ought to proceed.

The increasing recognition that effective leadership and management are vital if schools are to be successful in providing good learning opportunities for learners and the growing realisation that leadership requires specific preparation, is as important in the Foundation Phase as it is in the Senior of Further Phase of schooling. Yet, leadership development in Foundation Phase has not attracted as much attention as in the other phases. For this reason, the AdvDip (SLM) programme has attempted to create a space in which discussion on the context in which Foundation Phase school leadership operates is included.

The AdvDip (SLM) programme has been purposively constructed and the implementation approach designed to give effect to the conceptual and practice-based dimensions that are highlighted in the *Policy on the South African Standards for Principalship* (DBE, 2015) and the AdvDip (SLM) programme outline (DBE, 2015:8) documents cited above.

The school leader as enabler of leadership in others

This role has been discussed in some detail, above, as part of the discussion on distributed leadership, a leadership practice that is strongly promoted in the programme course materials.

24 The Department of Basic Education. 2015. Policy on the South African Standards for Principalship. Pretoria. DBE.

The school leader as scholar and researcher

The majority (83%) of school principals have undergraduate qualifications in which research is not a significant element of their training (Maringe and Moletsane 2015).[25] To address this lack, the *Policy on the South African Standards for Principalship* emphasises the importance of the *role of school leader as scholar* and the requirement that leadership and management decisions are e*vidence-based,* and are addressed in a number of ways. The role of school leader as scholar is addressed through the requirement that each programme participant successfully completes a Workplace Project (WPP). This is a compulsory component of the AdvDip (SLM) programme (as discussed above). An action research approach to the implementation of the WPP is promoted. Additionally, all modules comprise some research tasks that stress the value of evidence or data-based decision making.

The school leader as reflective practitioner

Critical reflection, also known as reflective practice, is central to the way the course is constructed and run. This dimension is developed through the requirement that Learning Journals have to be kept, in which aspiring and practicing principals record what is happening in their schools, problems which occur, and how they are solved.

The participants are required to reference entries and thoughts recorded in their Learning Journal in selected activities and to include these as formal reflective commentaries in their Professional Portfolios (PPs) for assessment purposes.

The activities which are embedded in the material are experiential by nature, requiring either individual or group reflection on a given scenario. Reflective practice is conceptualised as the ways in which programme participants are inducted into this practice and as a way to interact when they engage in collaboratively with fellow participants in the HEI-based communities of practice and/or in their school-based communities of practice (CoPs).

Communities of practice as a mechanism for collaborative leaning

As highlighted in Figure 3 (page 15, above) and aligned with the socio-cultural underpinning of the programme leaning design, *Communities of practice,* are structured into the programme as a key part of the implementation process. In this way, the participants are encouraged to co-operate, collaborate and share learning, learn from each other and construct knowledge and meaning together. It is hoped that the participants will be supported to set up school-based CoPs that include a range of stakeholders who can work together collectively over the two-year period.

Mentoring as a strategy for supporting school-based application of new practices

Given that the AdvDip (SLM) is a professional development qualification, there is much emphasis on applied practice. Assignments and particularly the Workplace Project, require the programme participants to enact positive change in their schools. Many of the assignments involve working with the SMT and parents to bring about changes in practices. These in turn should result in new behaviours, and new attitudes within a framework of different leadership management systems. Given the history of autocratic and hierarchical school management approaches in many schools (discussed above) site based *mentoring* of participants through visits to schools and group sessions in the universities is advocated as a mechanism for supporting the programme participants.

It is however, acknowledged that the mentoring aspect does not always fit easily within the confines of a traditionally-run university. Some universities found the mentoring element to be the most challenging aspect of the ACE (SL) programme implementation. HEIs are therefore urged to plan ahead as mentoring has both human resource and

25 Maringa, F., and Moletsane, R. Leading schools in circumstances of multiple deprivation in South Africa: Mapping some conceptual, contextual and research dimensions Volume: 43 issue: 3, page(s): 347-362 SAGE New York, quoted in the presentation on Principal Professionalisation made by Professor Felix Maringe at the EMASA 2018 Conference in East London.

financial implications which need consideration. Consideration also needs to be given to identifying suitable solutions and/or alternatives if regular site-based visits are not viable. In the ACE (SL) programme, HEIs found various ways of overcoming the mentoring challenge. The University of Cape Town, for example, found that the Communities of Practice (CoPs) guided by a mentor provided a cost effective way of mentoring. See Wylie & Silbert 2018[26].

Recommended mentoring and support strategy

Bush, Duku, Glover, Kiggundu, Msila and Moorosi (2009)[27] in their evaluation of the 2007-2009 pilot implementation of the ACE (SL) recommend that the mentoring programme should use ex–principals with a proven track record as mentors. The evaluation also highlighted the need for appropriate training of mentors, recommending that it should be intensive and structured around what "real" mentoring means. It is not sufficient for mentors to simply "visit" and "guide" or tell principals how to run their schools.

The evaluation report also recommended *networking* between principals and aspirant principals on the programme be supported and more fully developed as a strategy for mutual support. Participants need to do more than just compare notes about assignments. Rather, the role of real reflective practice needs to be developed further, which is the intended purpose of the CoPs.

The importance of participants meeting outside of the HEIs at arranged times, was also emphasised in the recommendations. This meant that the HEI has to play a key role in building up networking and group (CoP) meetings. If this level of interaction is improved, then collaborative learning will be in place.

For this to happen, mentoring or coaching on structuring of such meetings should be provided by the HEIs. Strategies for building capacity related to specific practices such as facilitation, mediation etc. should be factored into the support process offered by these institutions to ensure the quality of interaction during meetings. The following aspects should be considered as part of the planning, preparation and capacity building process.

It is necessary for CoP members to secure agreement and forge a common understanding of the following:

- Shared purpose of the meetings
- What is entailed in good communication
- The characteristics of a social constructivist approach to learning
- Capacity to facilitate group processes
- Ability to mediate conflict
- An understanding of how change and transition affect people.
- How to keep records of what was discussed and/or agreed on at meetings.

Effective use of ICT in school management

This aspect has also been discussed above in Section 1. As stated, a basic level of ICT competency is assumed as an entry requirement to this programme. If participants are not at the expected level, it is incumbent on the HEI to provide a bridging programme. The use of ICT as an effective tool in school management is discussed in Module 6: *Leading and managing the school as an organisation.*

26 Wylie, J. & Silbert, P. 2018. Building organisational capacity through a principals' community of practice. In P. Silbert, R. Galvan & J. Clark (Eds). Partnerships in action. Cape Town: Human Sciences Research Council Press.

27 Bush, T., Duku, N, Glover, D., Kiggundu, E., Msila, V. and Moorosi, P. 2009. School Leadership Research, Final Report. Johannesburg. Zenex Foundation.

In conclusion

These guidelines are neither exhaustive nor do they present all the answers to the challenges that HEIs will face. However, it is hoped that there is sufficient information here to help you begin your planning for a successful implementation of the AdvDip (SLM). Module 1, Parts 1 and 2 also provide extensive support on planning and implementing of this programme. This includes, suggested sequencing of modules, information on crosscutting themes, underpinning principles, the approach to assessment and practical information related to managing communities of practice, the preparation of the Professional Portfolio, the Personal, Professional and Organisational Development Plan and the Workplace Project.

An exemplar assessment matrix for the assessment of the AdvDip (SLM) programme's Professional Portfolio is provided below in the Appendix to this guide. It may be adapted or used as is.

Appendix: Exemplar Professional Portfolio Assessment Matrix

The portfolio brings together the Workplace Project and any additional information (tasks, assignments, reflections, PowerPoint Presentations etc.) that the programme participants may be required to provide regarding their competence as school leaders and managers.

The following matrix identifies the core learning outcomes of the programme for which evidence of competence needs to be supplied.

Learning outcome	Evidence from assignments	Verified by:	Evidence from portfolio activities	Verified by:	Evidence from Workplace Project	Verified by:
	(to be completed by candidate)		(to be completed by candidate)		(to be completed by candidate)	
Demonstrate a sound understanding of what is involved in school leadership and management in South Africa and in relation to what constitutes good practice in South Africa and other parts of the world (the outcome that is introduced here should be elaborated further in the introduction to each subsequent module of the programme).						
Understand how a professional portfolio can be used as a flexible assessment instrument and compile a professional portfolio which includes relevant evidence of professional development in school leadership and management with links between the evidence and the exit level outcomes, reflective commentaries, workplace project and the personal, professional and organisational development plan.						
Learning outcome	**Evidence from assignments**	**Verified by:**	**Evidence from portfolio activities**	**Verified by:**	**Evidence from Workplace Project**	**Verified by:**
	(to be completed by candidate)		(to be completed by candidate)		(to be completed by candidate)	
Plan, justify, execute and evaluate a workplace project aimed at school improvement.						
Make an assessment of own abilities in leadership and management in terms of current notions of competence and relevance in South Africa in relation to leadership and management.						
Demonstrate the personal and professional competencies, qualities and attributes necessary for effective leadership and management of teaching and learning.						
Lead and manage the planning and implementation and monitoring/ evaluation of teaching to ensure quality learning for all in the context of national, provincial and school policy.						
Understand and be able to apply relevant technical, pedagogic content knowledge in the design, implementation and evaluation of teaching and learning and the organisation of the school environment.						

Learning outcome	Evidence from assignments	Verified by:	Evidence from portfolio activities	Verified by:	Evidence from Workplace Project	Verified by:
	(to be completed by candidate)		(to be completed by candidate)		(to be completed by candidate)	
Demonstrate the personal and professional qualities necessary for effective leadership and management of extra-curricular and co-curricular activities.						
Manage the planning and implementation and monitoring/ evaluation of extra-curricular and co curricular activities to ensure quality learning for all in the context of national, provincial and school policy.						
Demonstrate sound understanding of the theories and models for leading and managing self and others.						
Demonstrate the personal qualities necessary for effective leadership and management of people.						
Demonstrate how to plan for and allocate staff; how to support and evaluate work undertaken by groups, teams and individuals ensuring clear delegation of tasks, responsibilities and accountability.						
Develop the professional skills of self, groups and individuals to enhance their performance and that of the school.						

Learning outcome	Evidence from assignments	Verified by:	Evidence from portfolio activities	Verified by:	Evidence from Workplace Project	Verified by:
	(to be completed by candidate)		(to be completed by candidate)		(to be completed by candidate)	
Create an environment conducive to collective bargaining, collaboration and negotiation.						
Understand schools as communities and be able to apply relevant content knowledge in leading and managing people both within and outside the school.						
Demonstrate the personal qualities necessary for effective leadership and management in working with the immediate and broader school community.						
Actively engage community resources in support of the school's vision, mission and curriculum and build the school into a broader community asset.						
Demonstrate the personal and professional qualities and skills necessary for effective management of organisational systems, including ICT, and financial and physical resources.						

Learning outcome	Evidence from assignments	Verified by:	Evidence from portfolio activities	Verified by:	Evidence from Workplace Project	Verified by:
	(to be completed by candidate)		(to be completed by candidate)		(to be completed by candidate)	
Implement, evaluate and maintain and improve organisational systems for the school where possible making use of appropriate information and communication technology ICT.						
Lead and manage the physical and financial resources of the school in a transparent and accountable way.						
Understand and be able to apply relevant content knowledge and skills in the management of organisational systems, ICT and physical and financial resources.						
Create, manage, innovate, and sustain appropriate systems and procedures to enhance a caring and disciplined environment and show commitment to following this through in the way in which teaching and learning is organised.						
Demonstrate a sound understanding of the overall contemporary policy context applicable to schooling in South Africa.						

Learning outcome	Evidence from assignments	Verified by:	Evidence from portfolio activities	Verified by:	Evidence from Workplace Project	Verified by:
	(to be completed by candidate)		(to be completed by candidate)		(to be completed by candidate)	
Demonstrate the personal qualities necessary for effective management of legislative mandates, policy, planning, school development and governance.						
Develop and communicate school values, vision, mission, policies and plans in a collaborative way and secure commitment to these.						
Develop and maintain sound working relationships with the School Governing Body as well as parents, learners, the community and the department.						
Understand and be able to apply relevant content knowledge in leading and managing policy, planning, school development and governance.						

(Source: Department of Basic Education (2015) Advanced Diploma in School Leadership and Management Programme Outline Final. Pretoria. DBE)

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